North Carolina
State Board of Elections

Campaign Finance
Reporting Software

Quickstart Installation
and User Guide

Updated on 11/26/2012

PREFACE

The purpose of this manual is to give an overview of how the Campaign Finance Remote Software operates. It will guide you through:

- Installing the software
- Adding Elections
- Setting Up a Committee
- Adding/Managing Receipts
- Adding/Managing Expenditures
- Adding/Managing Debts
- Adding/Managing Loans
- Refunds
- Account Transfers
- Creating/Managing Reports
- Data Protection

This document is not intended to cover every scenario possible for an individual entity. If you have a situation you are not sure about please contact us at:

919-733-7173

*** VISTA USERS ***

If you are running Microsoft Vista you will need to run the application in Administrator Mode. To do this; Right Click on the CF Remote Icon located on the desktop and Select **“Run as Administrator”**

Table of Contents

SOFTWARE INSTALLATION

Internet Setup

To install the software from the internet, first open your browser.

1. Now go to the SBOE homepage, http://www.sboe.state.nc.us.

2. Click on **Campaign Finance** near the top of the page.

3. On the left hand side Click → **Software**

4. In the center of the screen you will see: ***CF Remote Software – Full Installation in One file***

Description	File Name	Version	Size	Last Updated
CF Remote Software - Full Installation in One File * This is the entire installation of the remote software in one single file.	Download Now	4.0.55	46.6 MB	08-31-2007
CF Remote Software - Instruction Guide * This is the remote software instruction guide to help you get started using the software.	Download Now	1.0.4	8.33 MB	06-14-2007
CF Remote Software - Easy Web Installation * This is the entire installation of the software. This installation is recommended for dial-up internet connections and broken up into multiple files.	Download Now	4.0.55	161 KB	08-31-2007

5. Click → **Download Now**

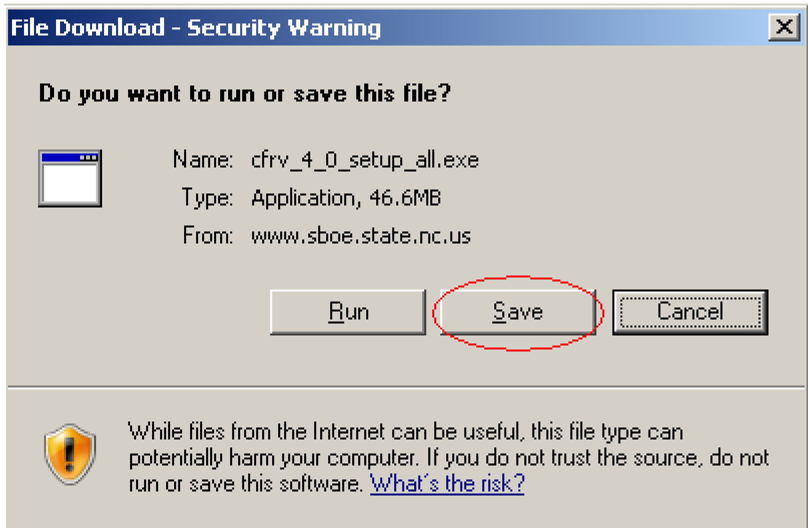
Note: The smaller installation requires an internet connection to run properly while the larger installation does not.

Internet Setup – cont.

After the download is complete the following window will appear

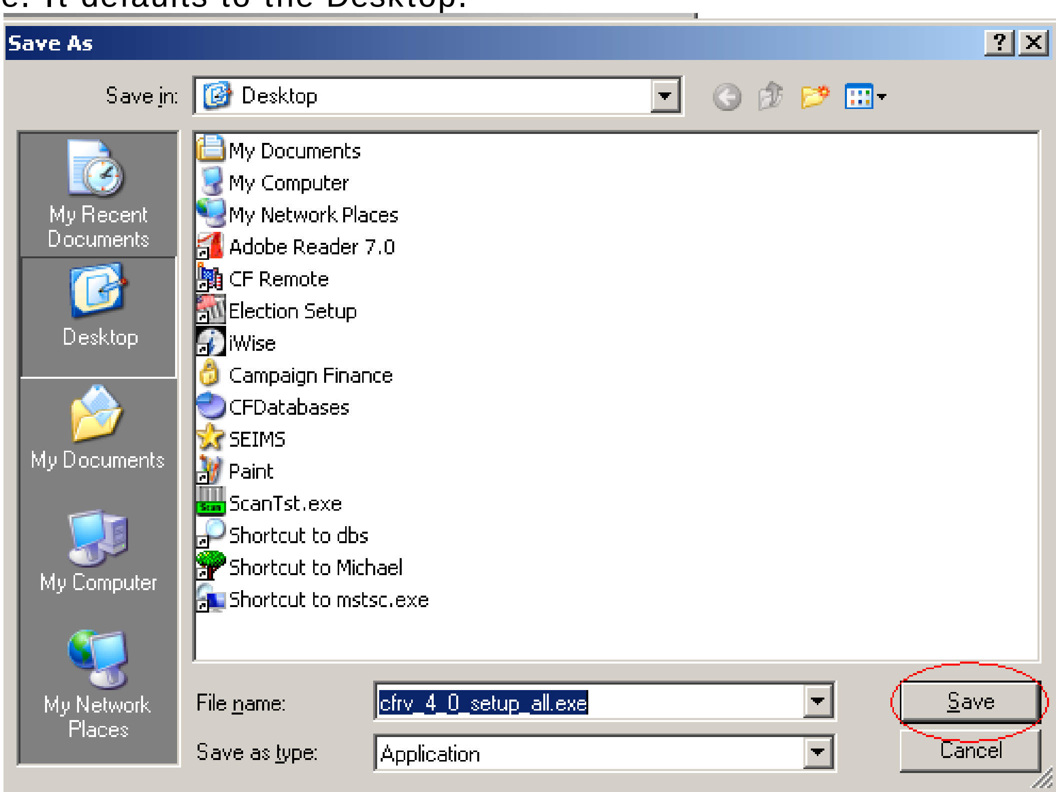
Note: If you chose to Save instead of Run follow the inserted steps

Chose either → **Run** or **SAVE**



- If you Click → **Save**

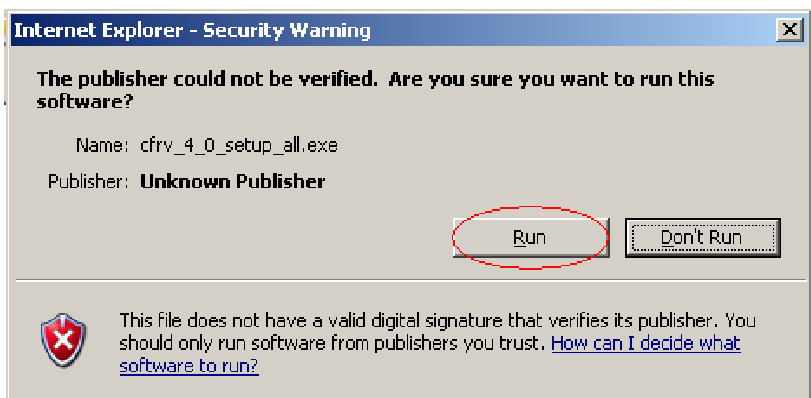
The next window that comes up will ask you where you want to save the file. Select a location on your computer that you can easily remember for saving the file. It defaults to the Desktop.



Internet Setup – cont.

After the download is complete, go to the location where the installation was saved and double-click on the file. Continue with the installation instructions

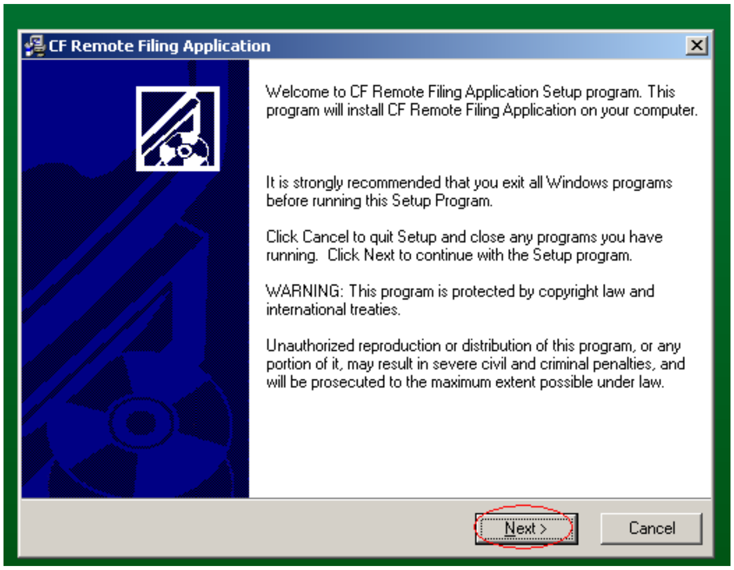
This screen will appear if you click **Run**



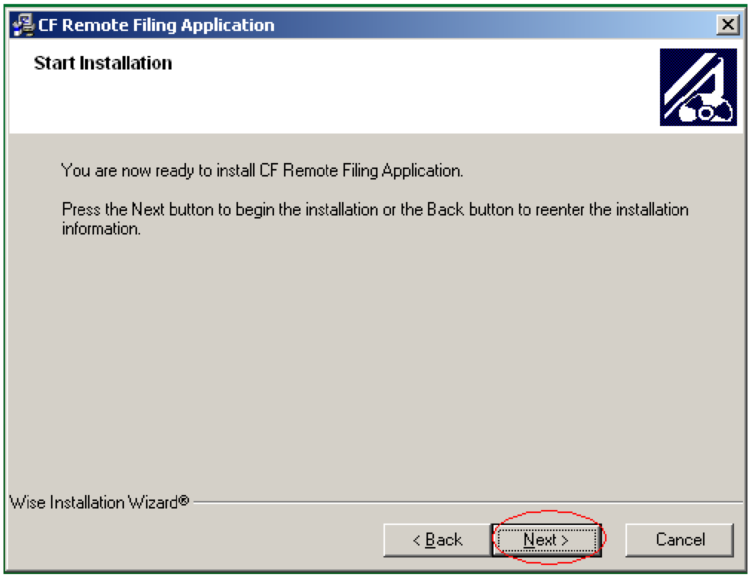
Internet Setup – cont.

This screen appears after a moment

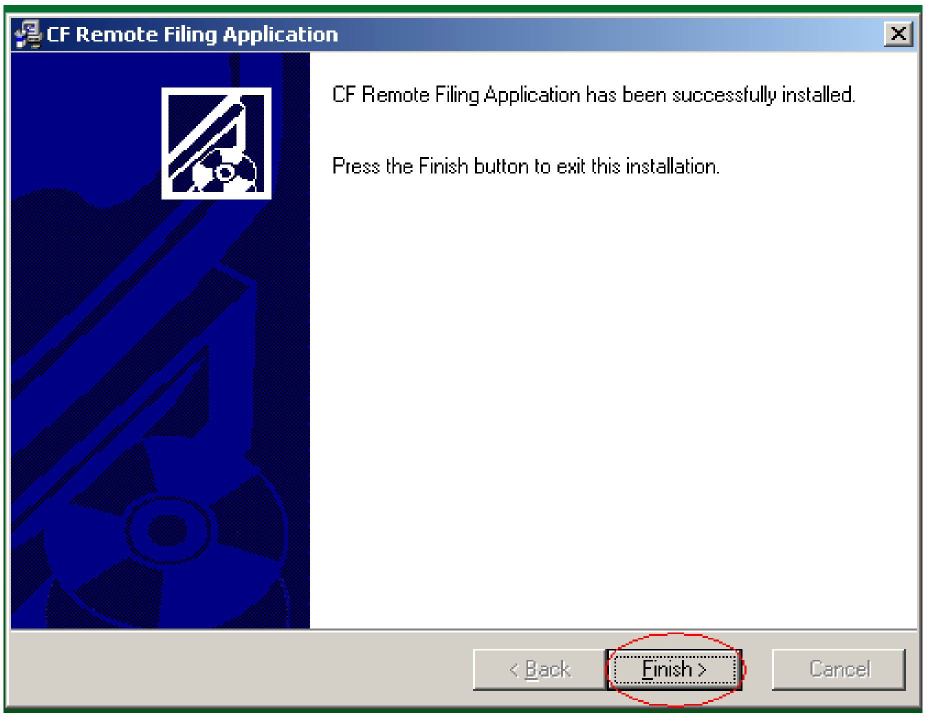
Click → **Next**



Click → **Next** again



Click → **Finish**

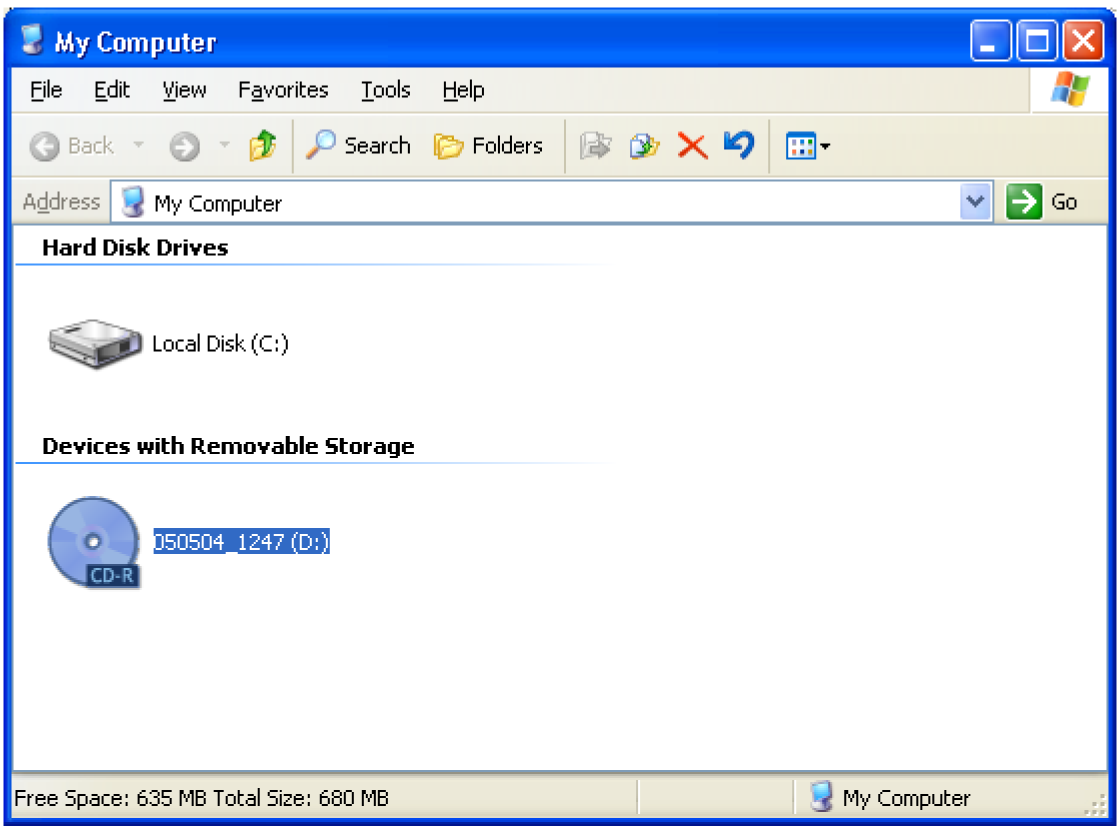


After a moment the green screen will disappear and the install is complete.

Regular CD Setup

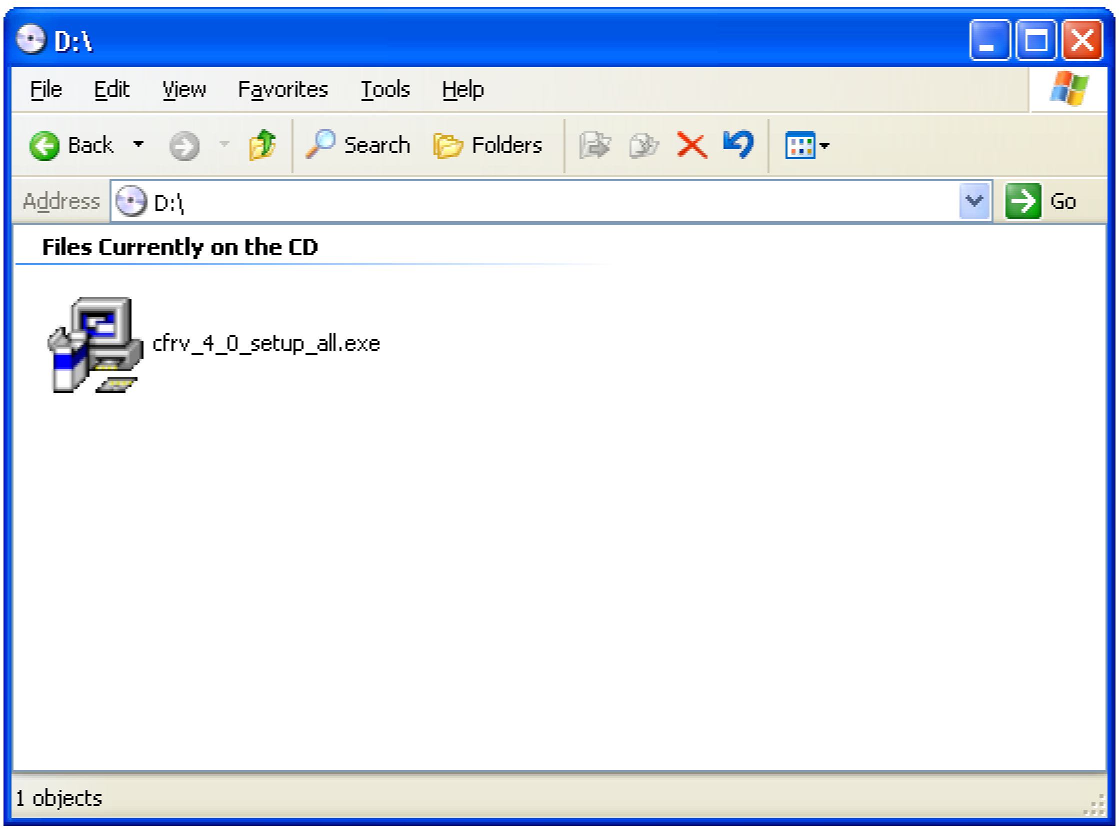
Put the installation CD in your CD drive. The installation may start automatically, if it does not, go to your desktop and double-click on **My Computer**.

When that opens up, find your CD drive and double click the icon for it.



Regular CD Setup – cont.

You will see a window with only one file in it. Double click the file to run the installation.

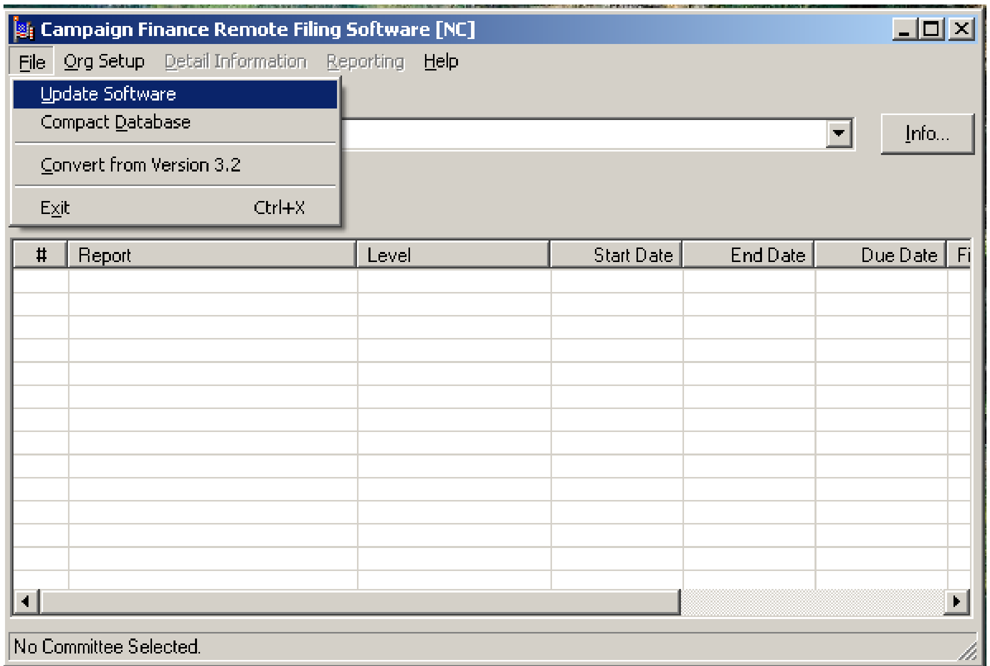


Follow the install instructions that appear on page 7.

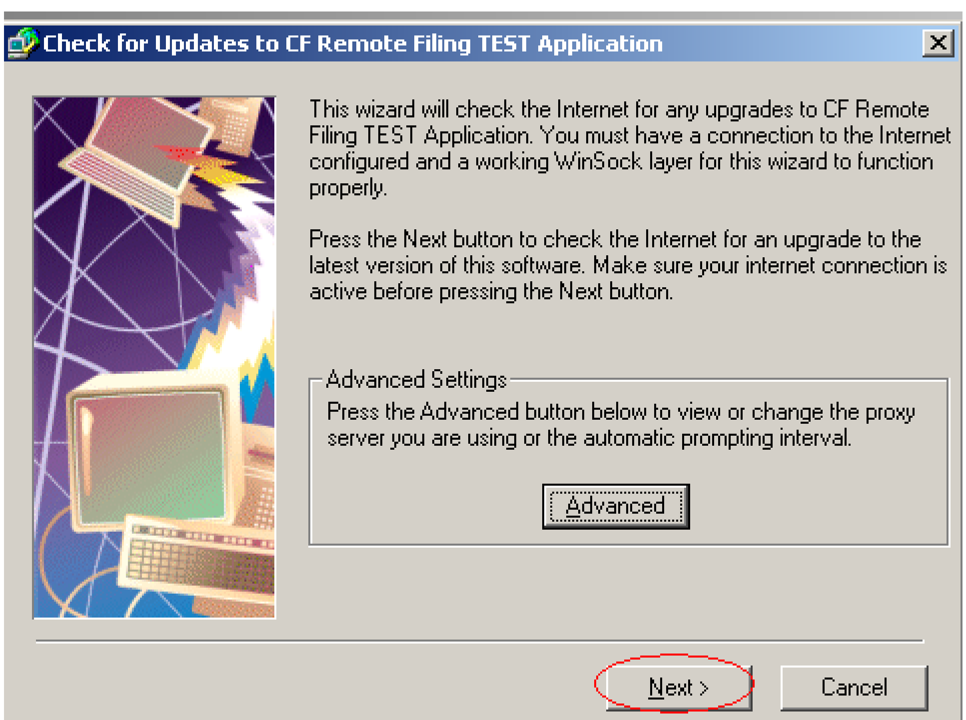
Updating version 4.x

* You must be connected to the Internet to update the software.

1. Double-click the **CF Remote** icon  on your desktop to open the main window shown below.

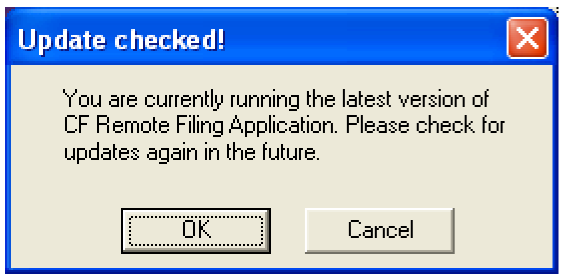


2. Click **File → Update Software**
3. Click **Next**

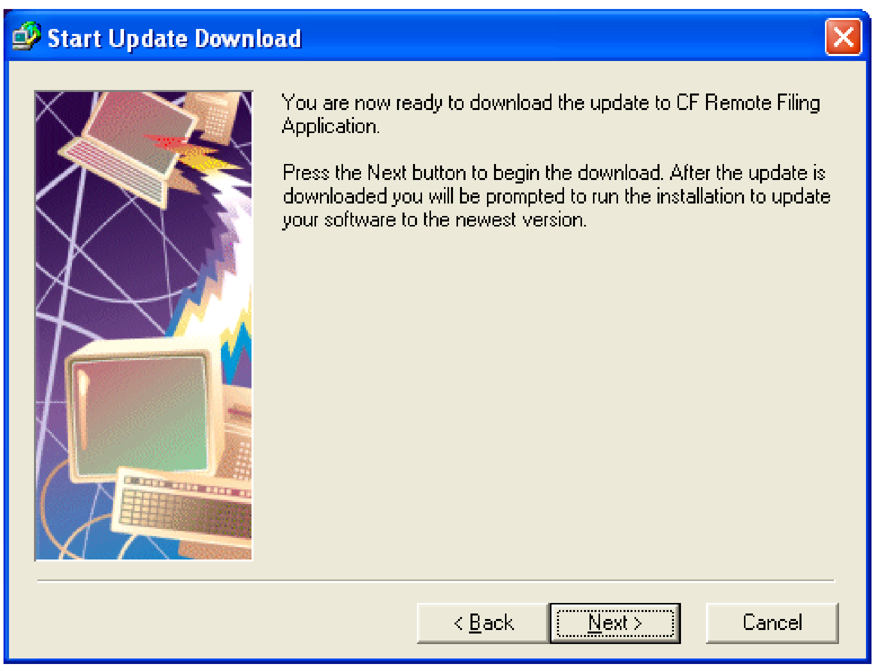


Updating version 4.x – cont.

4. If you already have the latest version you will get this screen. Click **OK** and proceed to **Setting Up a Committee** on page 21.

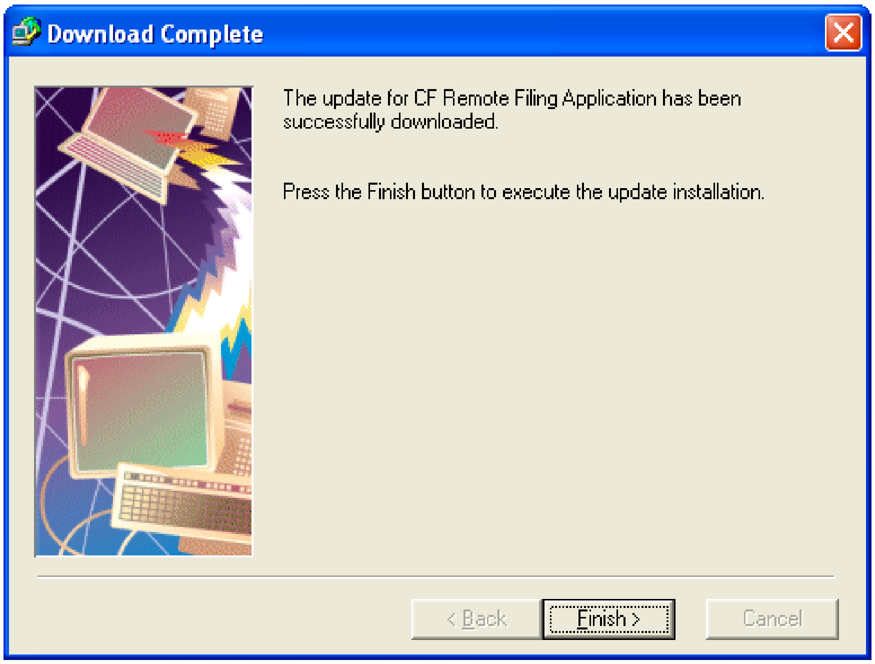


5. If you need to update you will see this screen. Click **Next.**



Updating version 4.x – cont.

6. The update will be downloaded after which you will see this screen. Click **Finish.**

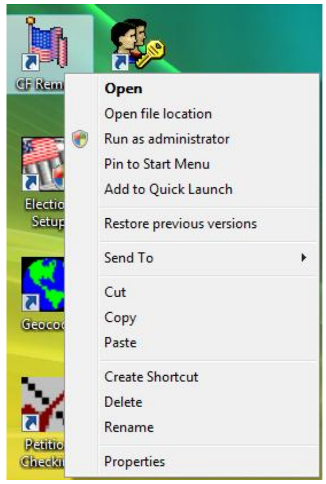


At this point the installation for the update will begin.
Refer to steps of the **Installation** section beginning on page **7** for instructions.

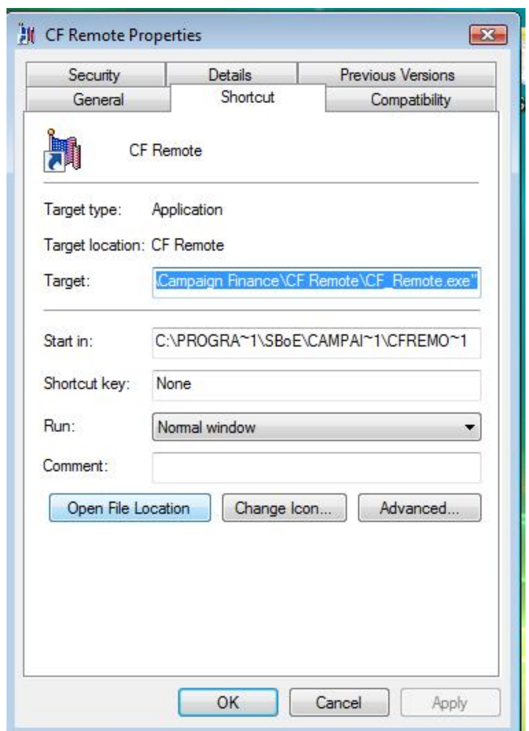
VISTA USERS

How to Move cf_data from VirtualStore in Vista

1. Right click the CF Remote Icon on the desktop.

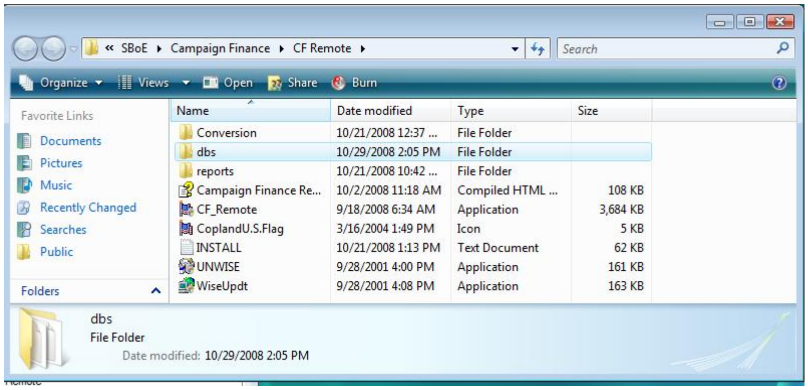


2. Select **Properties**.

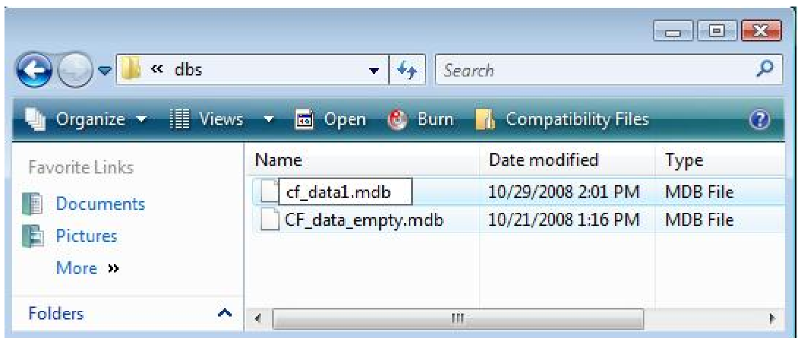


3. On the Shortcut Tab Select **Open File Location**.

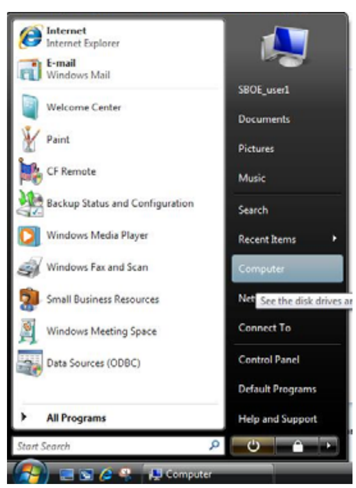
How to Move cf_data from VirtualStore in Vista cont.



4. Open the **dbs** folder.
5. Right click on the **cf_data** file and select **Rename**.
6. Enter **cf_data1**. See image below.



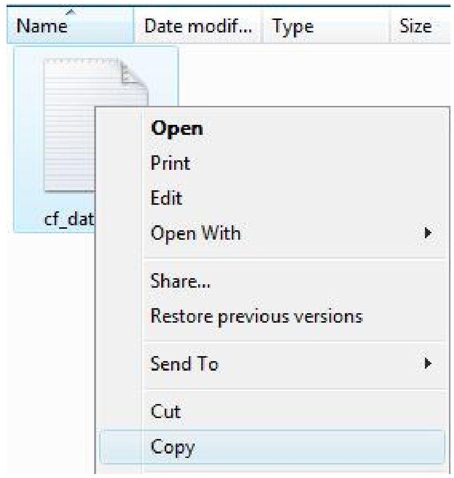
7. Click the minimize button  so that the windows goes to the toolbar.
8. Click on Start → Computer



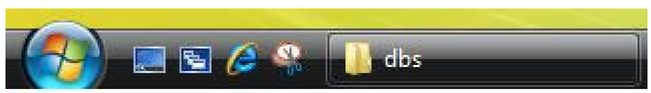
9. Click Local disk *C:\Users\"Your User Name"\AppData\Local\VirtualStore\Program Files\SBoE\Campaign Finance\CF Remote\dbs*

10. Right Click on the cf_data file and select **copy**.

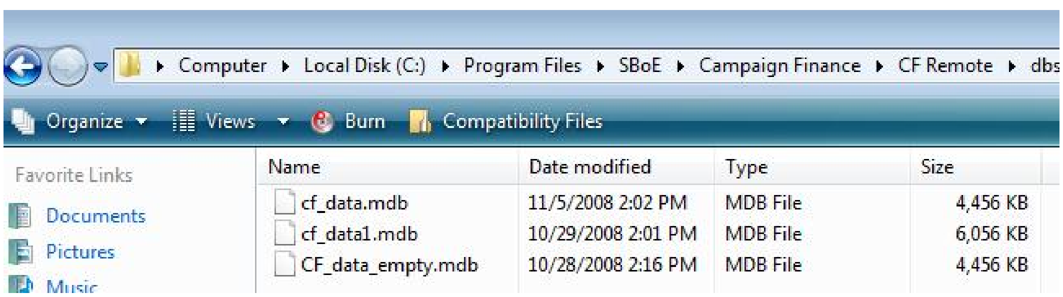
How to Move cf_data from VirtualStore in Vista cont.



11. Click the dbs button located in the tool bar.



12. The dbs folder should be open in the empty space of the folder right click and chose **Paste**.



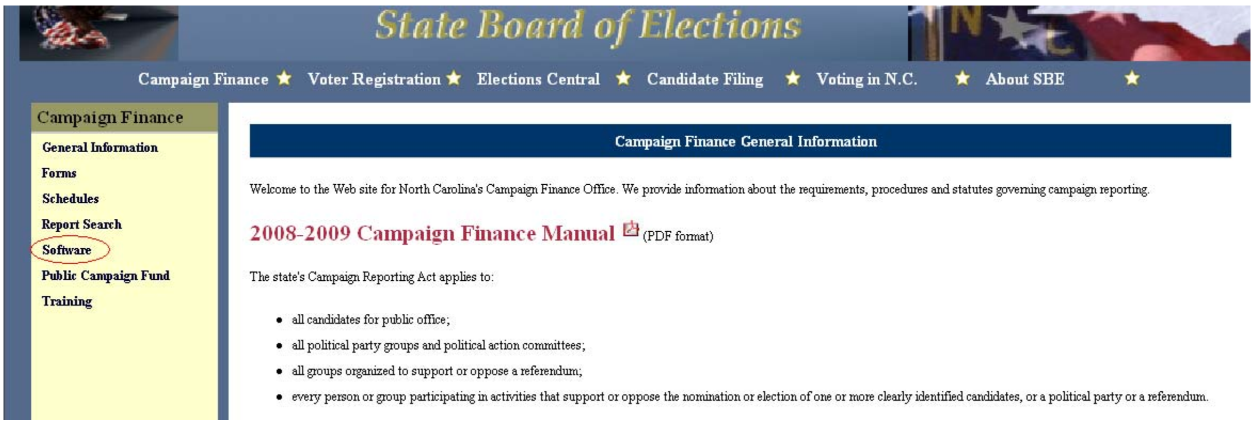
13. Your **dbs folder** should look like what is pictured above.
14. If it has not already been done please go back and enable **Run as Administrator**.

PRINTING AND SAVING THE MANUAL

Printing and Saving the Manual

1. Click on **Campaign Finance** near the top of the page.

2. On the left hand side Click → **Software**

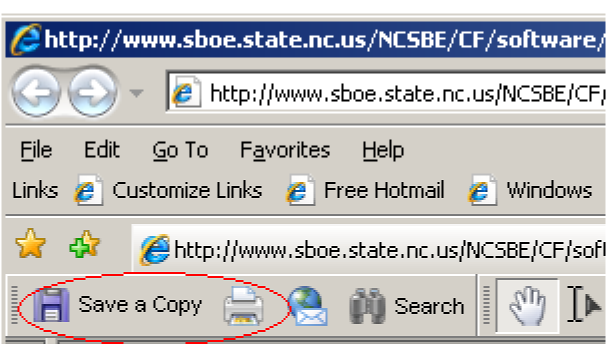


3. In the center of the screen you will see:
   CF Remote Software – Instruction Guide

This opens the manual for viewing.

Description	File Name	Version	Size	Last Updated
CF Remote Software - Full Installation in One File * This is the entire installation of the remote software in one single file.	Download Now	4.0.55	46.6 MB	08-31-2007
CF Remote Software - Instruction Guide * This is the remote software instruction guide to help you get started using the software.	Download Now	1.0.4	8.33 MB	06-14-2007
CF Remote Software - Easy Web Installation * This is the entire installation of the software. This installation is recommended for dial-up internet connections and broken up into multiple files.	Download Now	4.0.55	161 KB	08-31-2007

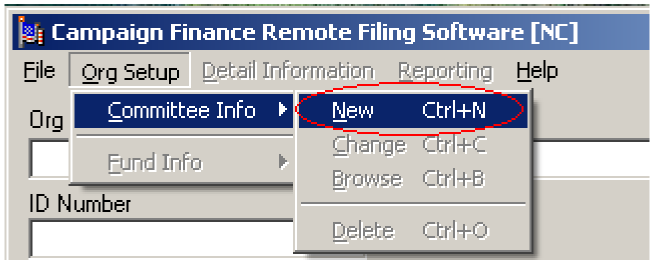
At this point you can may save a copy to your computer or print a copy if you choose too.



SETTING UP A COMMITTEE

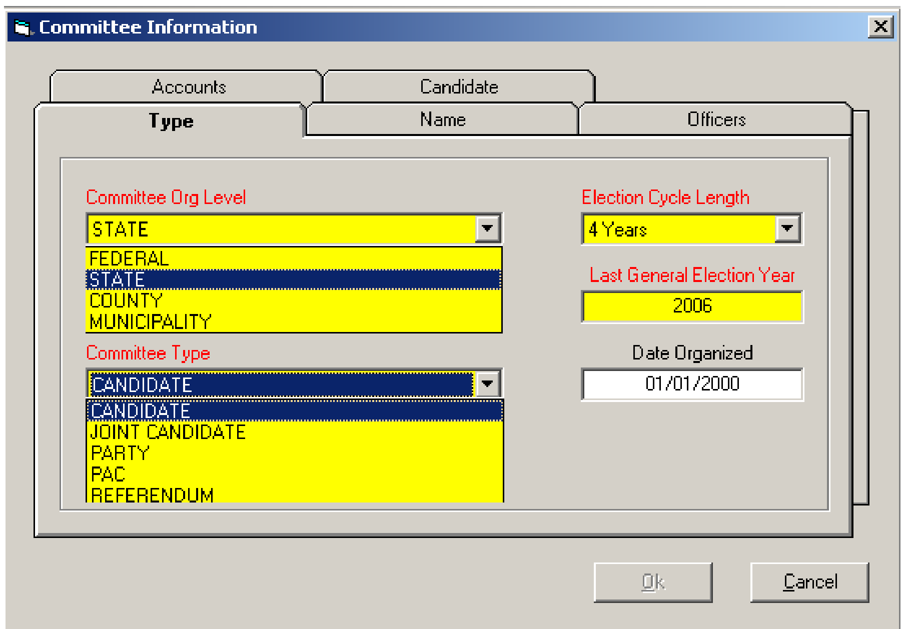
Setting Up a Committee

1. Click **Org Setup → Committee Info → New**...



Note: Select the appropriate combination for your committee

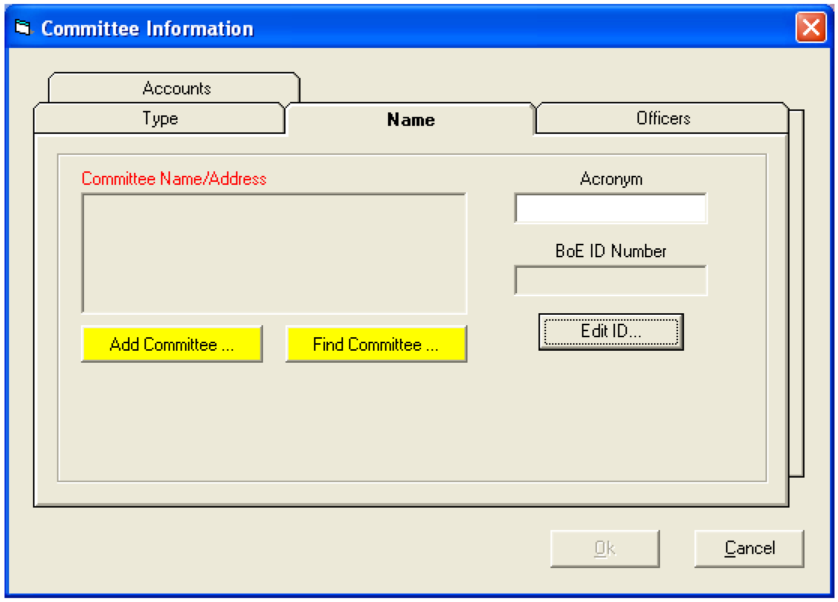
Select each tab and fill in the required fields (*Red lettering and yellow boxes indicate required fields*).



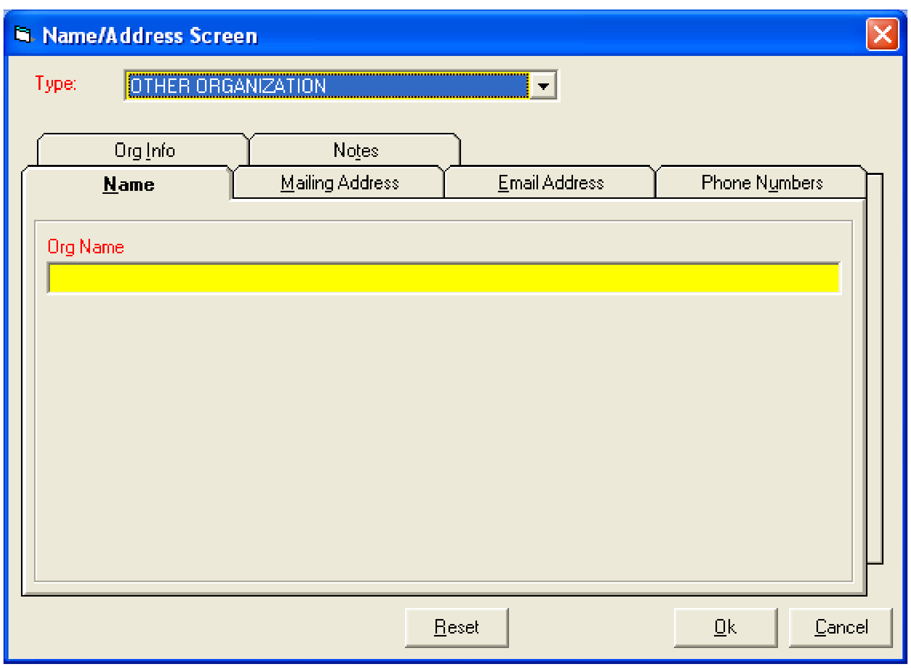
NOTE: All fields on the **Type Tab** are required for the reports to appear correctly including **Date Organized**.

Setting Up a Committee – cont.

2. Click the **Name** tab to enter name information about the committee.



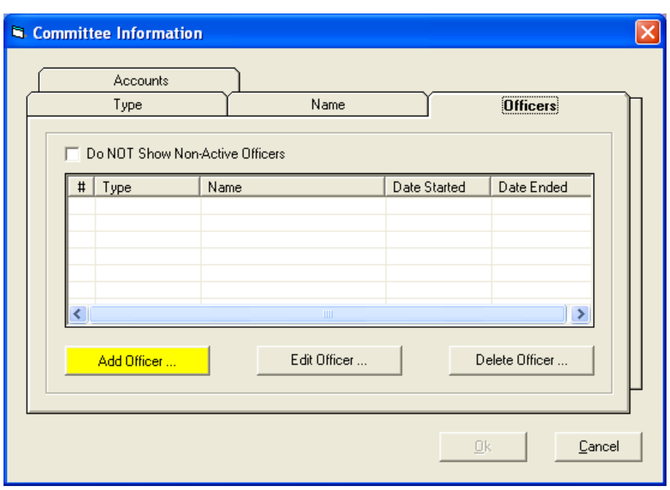
When you click **Add Committee**, you are directed to a different screen (**Name/Address Screen**). For each tab (**Name, Mailing Address, Email Address, Phone Numbers, Org Info, Notes**) enter any required information and any additional information you have and click **OK**.



Setting Up a Committee – cont.

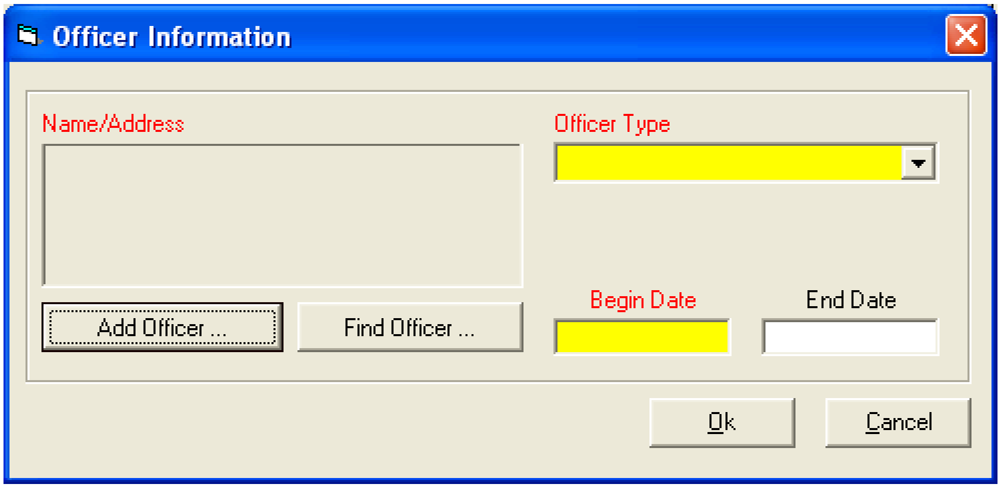
Tab	Function
Name	Use to record the name of the associated committee or individual. If the selection made in the **Type** field is other than INDIVIDUAL, only the **Org Name** field displays. If the selection made in the **Type** field is INDIVIDUAL, a more detailed form displays to include complete name information, as well as professional and employment information.
Mailing Address	Use this window to record a complete mailing address, regardless of whether or not there is also a separate physical address. If there is a different physical address, however, remove the checkmark from the **Physical and Mailing Address are the same** checkbox to display the **Physical Address** tab. If the address is not in the United States, check the **Address Not in US** checkbox to display the required form.
Physical Address	Use to record a complete physical address, if the physical address is different from the mailing address. If the address is not in the United States, check the **Address Not in US** checkbox to display the required form.
Email Address	Use to record up to four Email addresses for the committee.
Phone Numbers	Use to record up to three telephone numbers for the committee.
Org Info	Use to record State and Federal IDs, and Committee Level. Displays when the selection made in the **Type** field is other than INDIVIDUAL. as described above.
Notes	Use to add notes about the committee or its processing. Is also used to indicate the amount of money previously received from or expended to the associated committee, organization or individual.

3. Click the **Officers** tab to enter officer information about the officers.

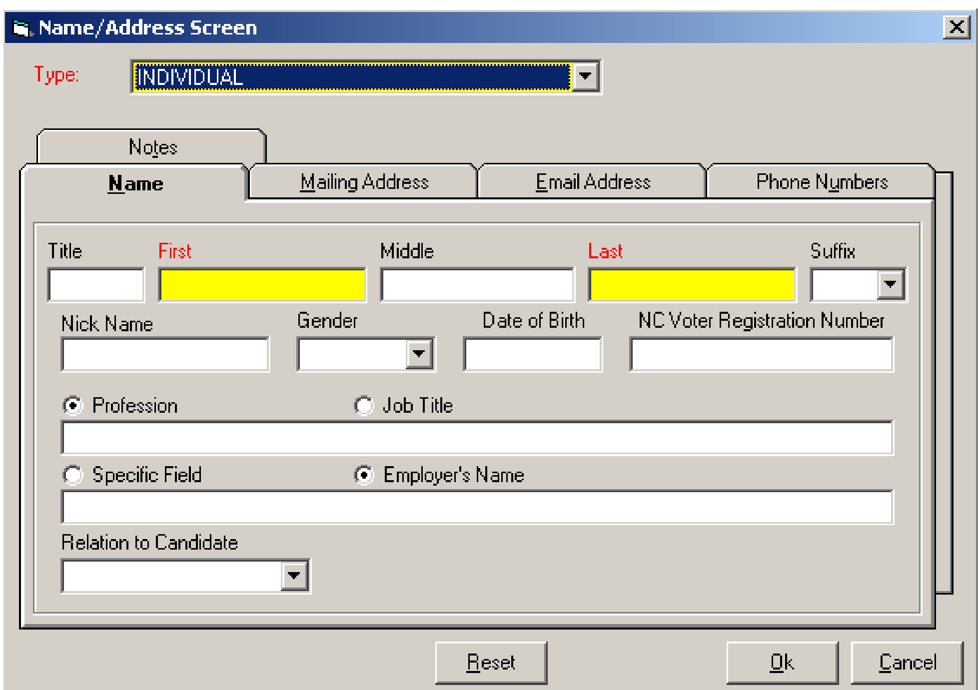


Setting Up a Committee – cont.

When you click **Add Officer** you are directed to the **Officer Information** screen. Fill in the required information for officer type and begin date.



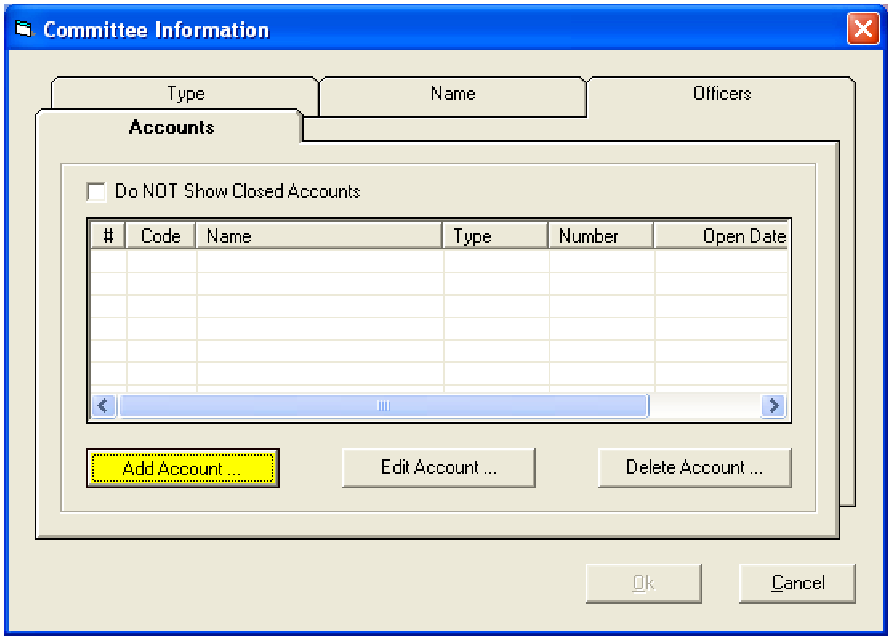
4. Click **Add Officer**, you are directed to a different screen



For each tab (**Name, Mailing Address, Email Address, Phone Numbers, Org Info, Notes**) enter any required information and any additional information you have and Click **OK**.

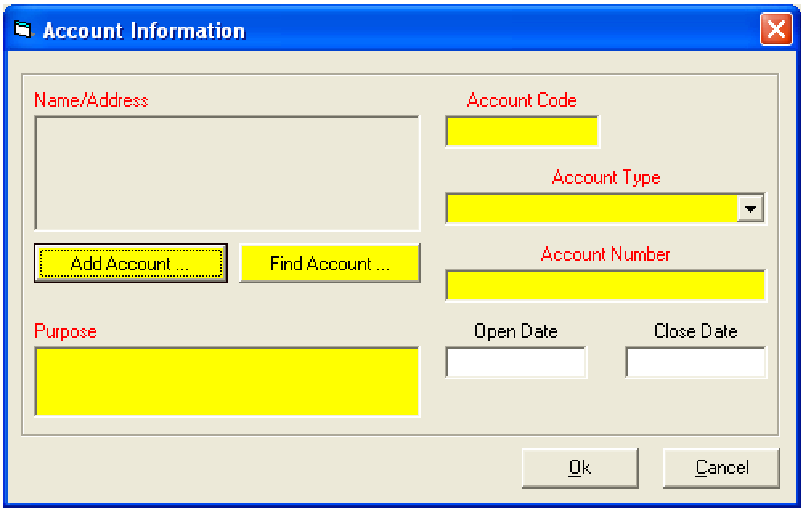
Setting Up a Committee – cont.

5. Click the **Accounts** tab to enter information about the accounts.



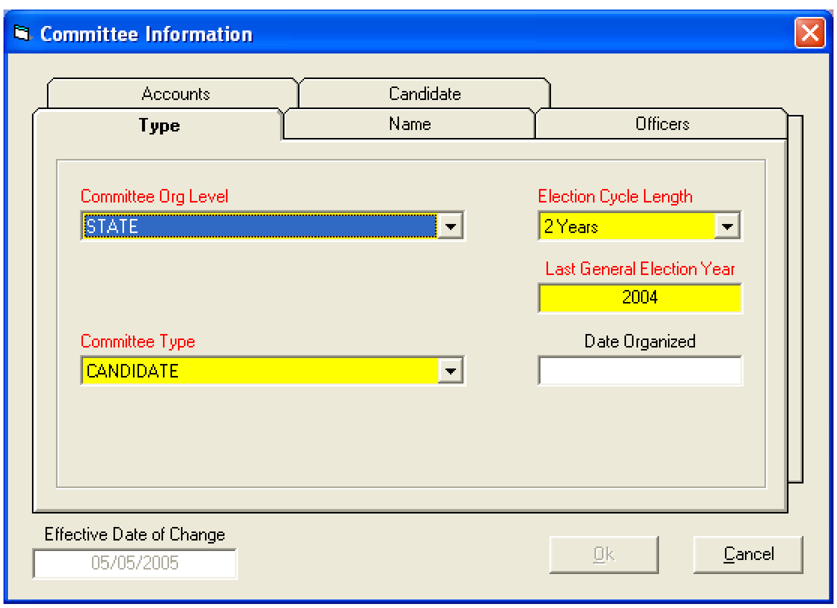
Setting Up a Committee – cont.

When you click **Add Account** you are directed to the **Account Information** screen. Fill in the required information for account code, account type, account number and purpose.



When you click **Add Account**, you are directed to a different screen (**Name/Address Screen**). For each tab (**Name, Mailing Address, Email Address, Phone Numbers, Notes**) enter any required information and any additional information you have and click **OK**.

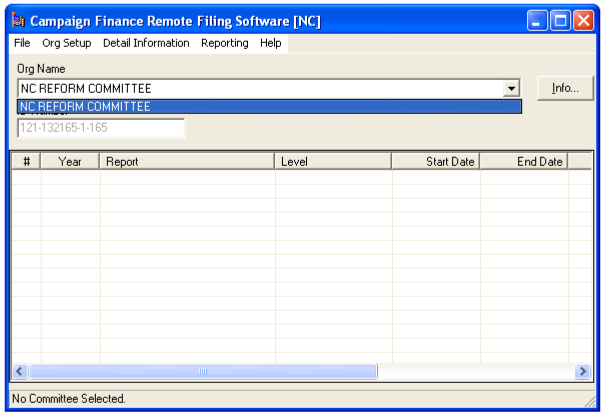
6. Click **OK** to close the **Committee Information** window and display the main window.



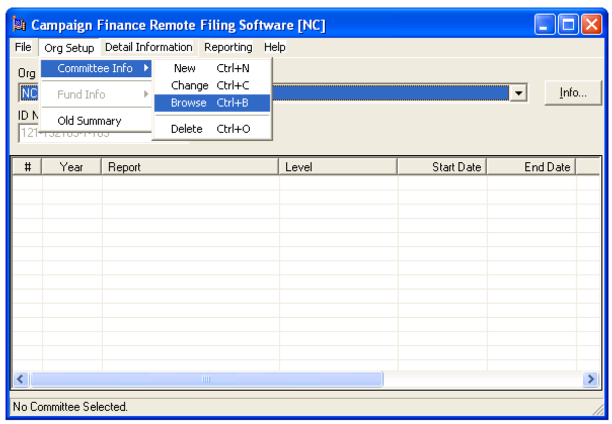
NOTE: When all **required information** is entered, the **OK** button in the Committee Information window becomes active.

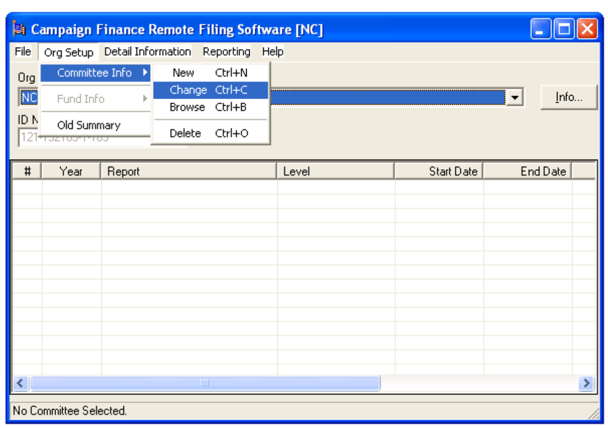
Setting Up a Committee – cont.

The committee that you created now displays in the main window's **Org** field drop-down list, and may be selected for viewing or editing.



To **View** or **Change** information on the committee just created, select the name from the **Org** field drop-down list, and select **Org Setup → Committee Info → Browse →** or **Org Setup → Committee Info → Change.**

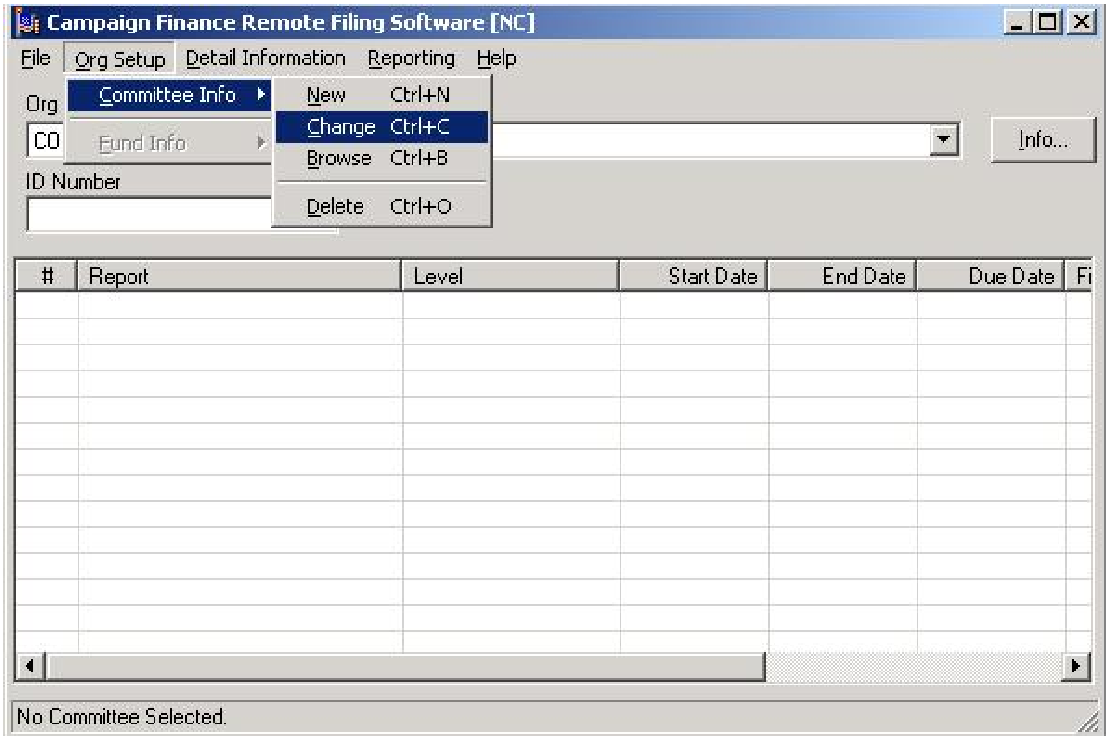




Recording Public Finance Information

If the candidate committee will be receiving funds from public financing, or is opposing someone who will be receiving funds from public financing, you must provide additional information through this software. Follow the steps below to ensure your compliance.

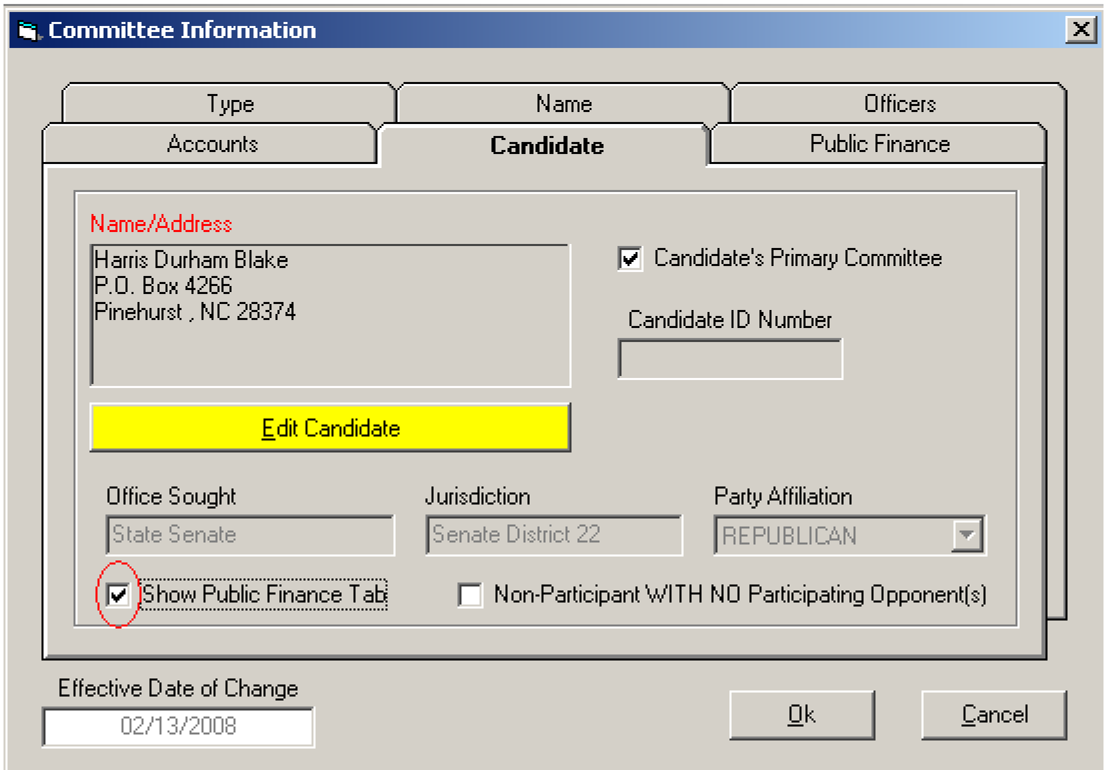
1. From the main Campaign Finance Remote Filing Software screen, Click **Org Setup → Committee Info → Change**



This will bring up a window asking for the effective date. Click **OK**.

Recording Public Finance Information – cont.

2. Click the **Candidate** tab. Check the box near the bottom which says **Show Public Finance Tab**.



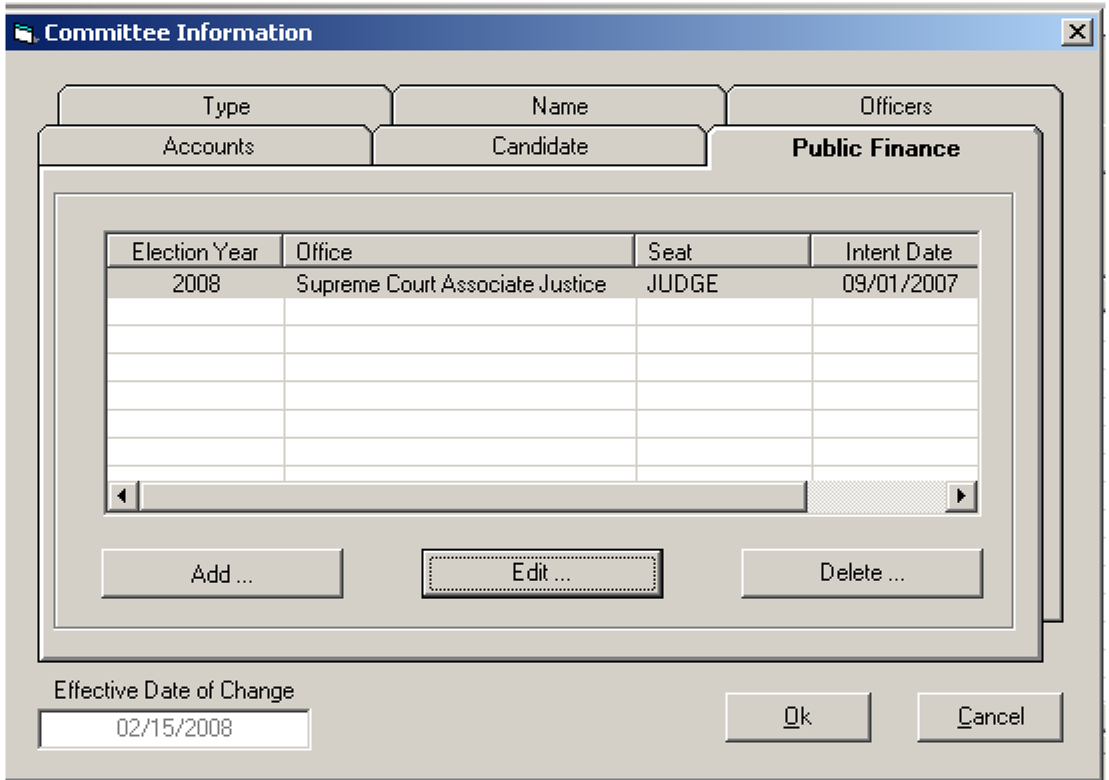
If you are a non-participating candidate, but are opposing a participating candidate, you can stop here.

If you are a non-participating candidate, and have no participating opponents, check the box, which says **Non-Participant WITH NO Participating Opponent(s)**, and stop there.

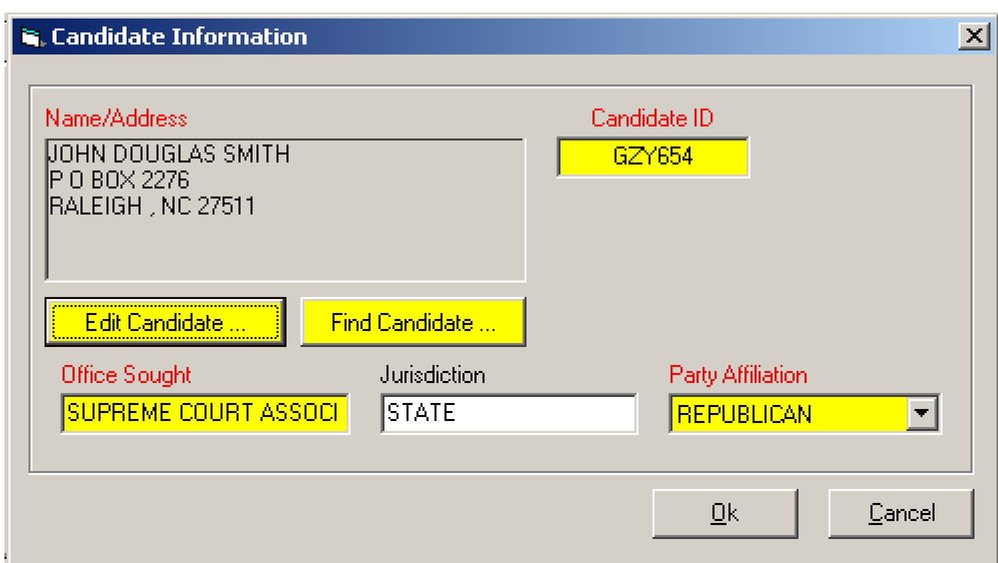
Otherwise, if you are the candidate seeking certification in the NC Public Campaign Fund, please continue.

When you clicked on the checkbox, which says **Show Public Finance Tab**, the **Public Finance** tab should have appeared, click on this tab.

Recording Public Finance Information – cont.



3. Click on the Add button. This opens the Public Finance Information window. Choose the Office for which the candidate is running from the **Office** drop-down box. Type in the **Seat**, **Election Year** and **Intent Date** if the candidate has filed for Intent. Fill in the box labeled **Certified Date** if and when they become certified.



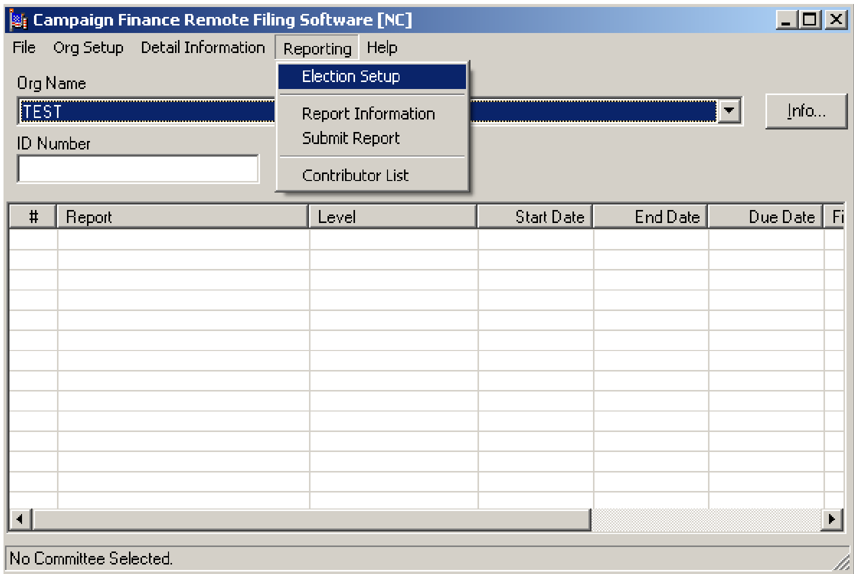
4. When done, click **OK**.

ADDING ELECTIONS

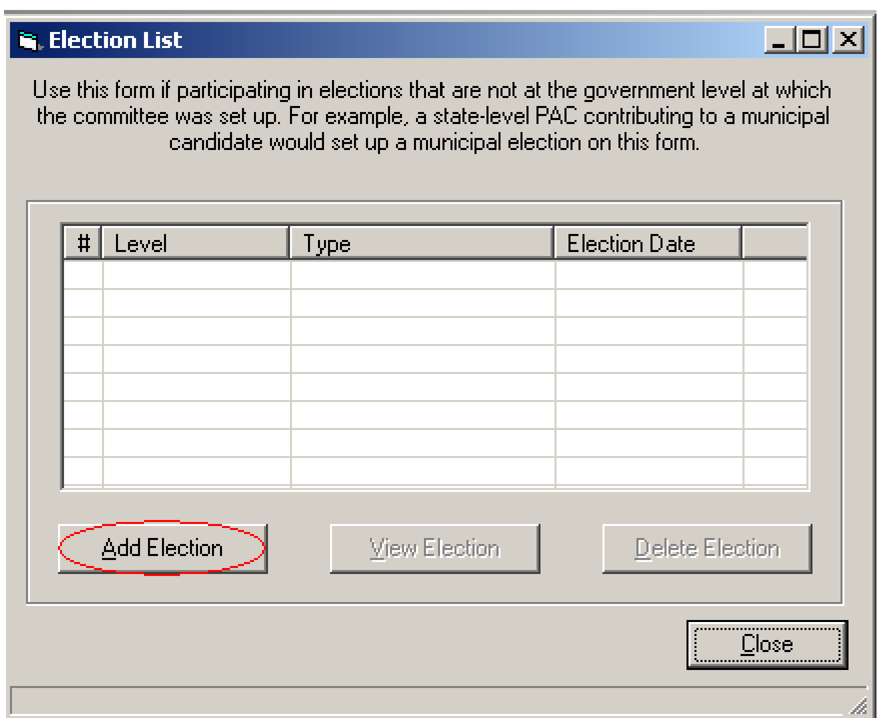
Adding an Election

Note: In order for the Election Sum to Dates to calculate correctly the Committee Date Organized is required. (Refer to pg.20 in the Setting up a Committee section)

1. Click → Reporting → Election Setup

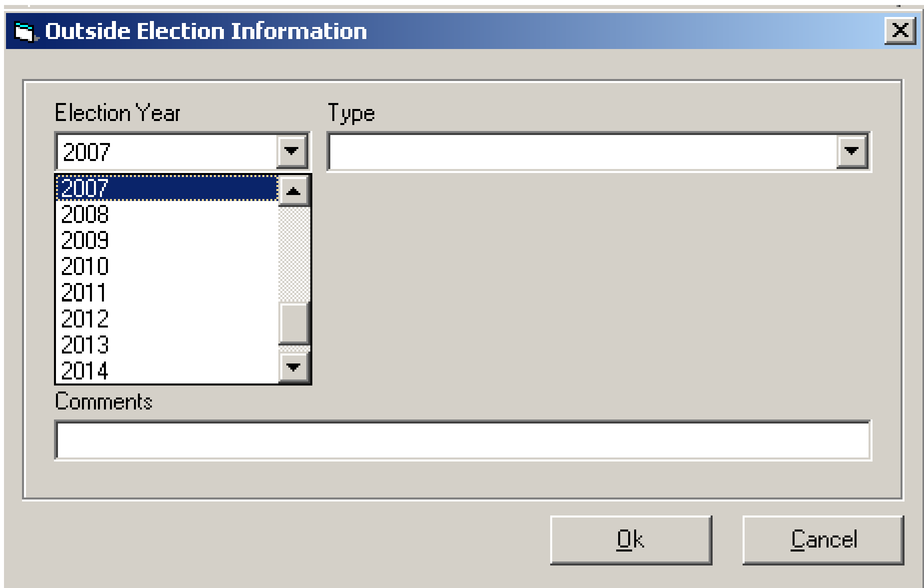


2. Click → Add Election



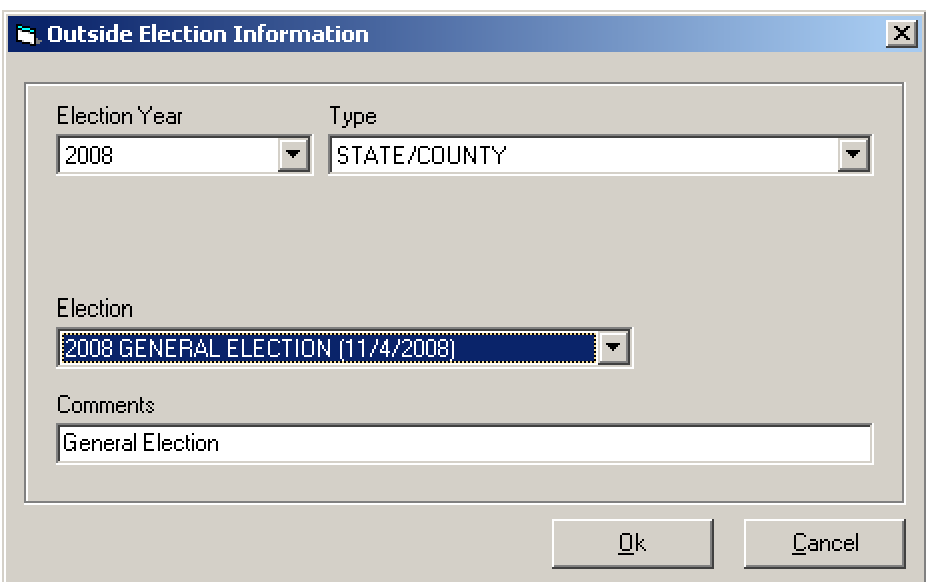
Adding Elections – cont.

3. In the Election year dropdown select the **year** of the election the office was last up for election (example 2004 would be selected if President is the office sought)



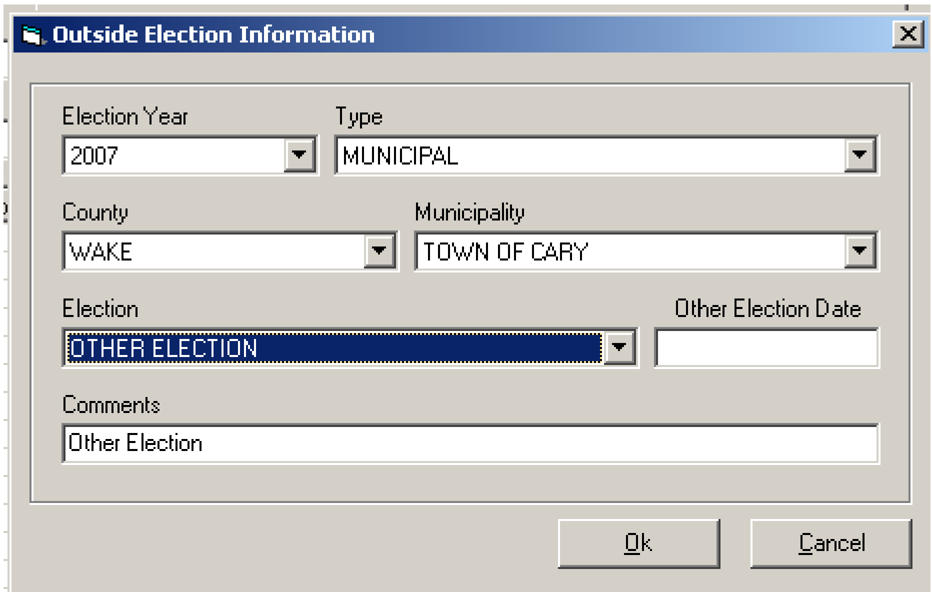
4. Then Select the **Type** of Election
5. Next Select the **Election**

A similar screen will appear as below

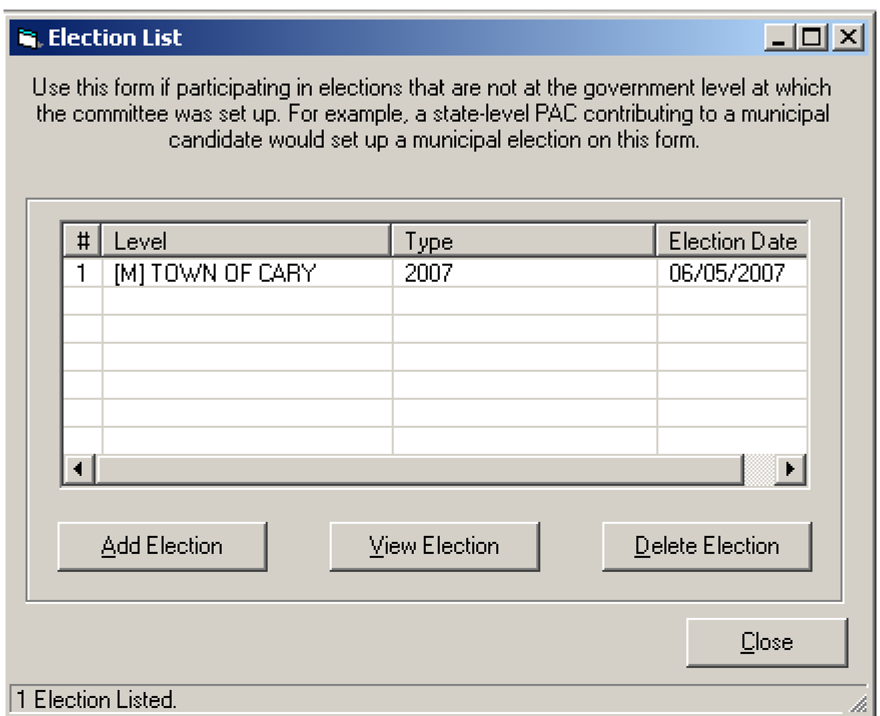


Adding Elections – cont.

6. If you want to enter a **Municipal election** fill in the following information
7. Enter the **Other Election Date**
8. Click > **OK**



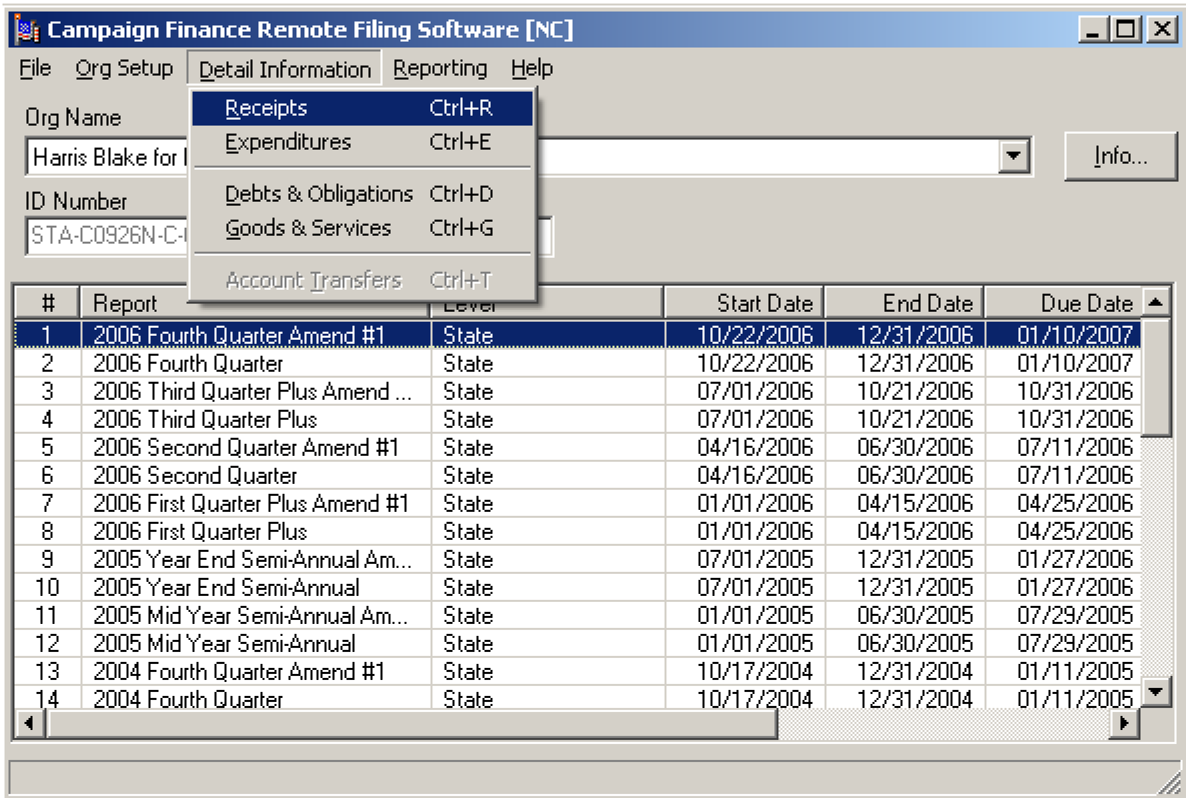
9. The following window will appear and **display all of the elections** you have entered for your Committee
10. You are able to **Add**, **View** and **Delete** the elections from this window



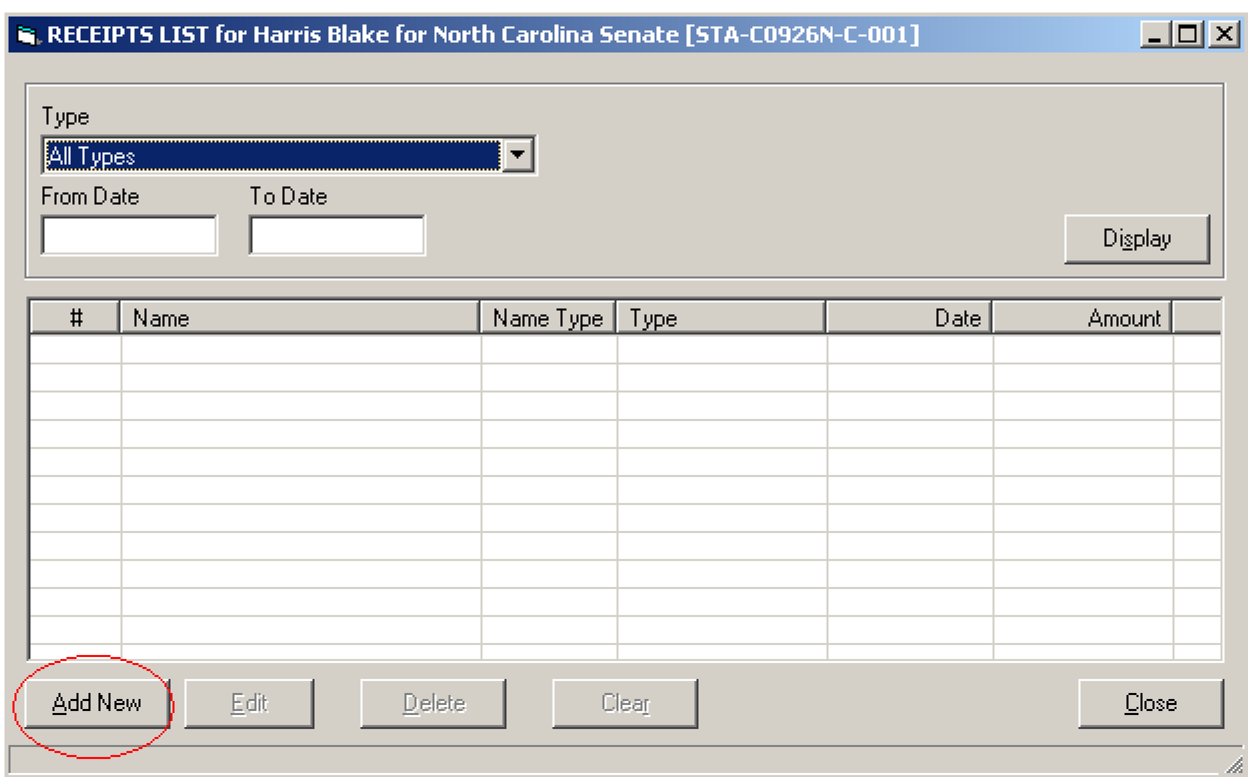
RECEIPTS

Adding Receipts

1. To enter a receipt (contribution) for your committee click on **Detail Information → Receipts** from the drop down list.

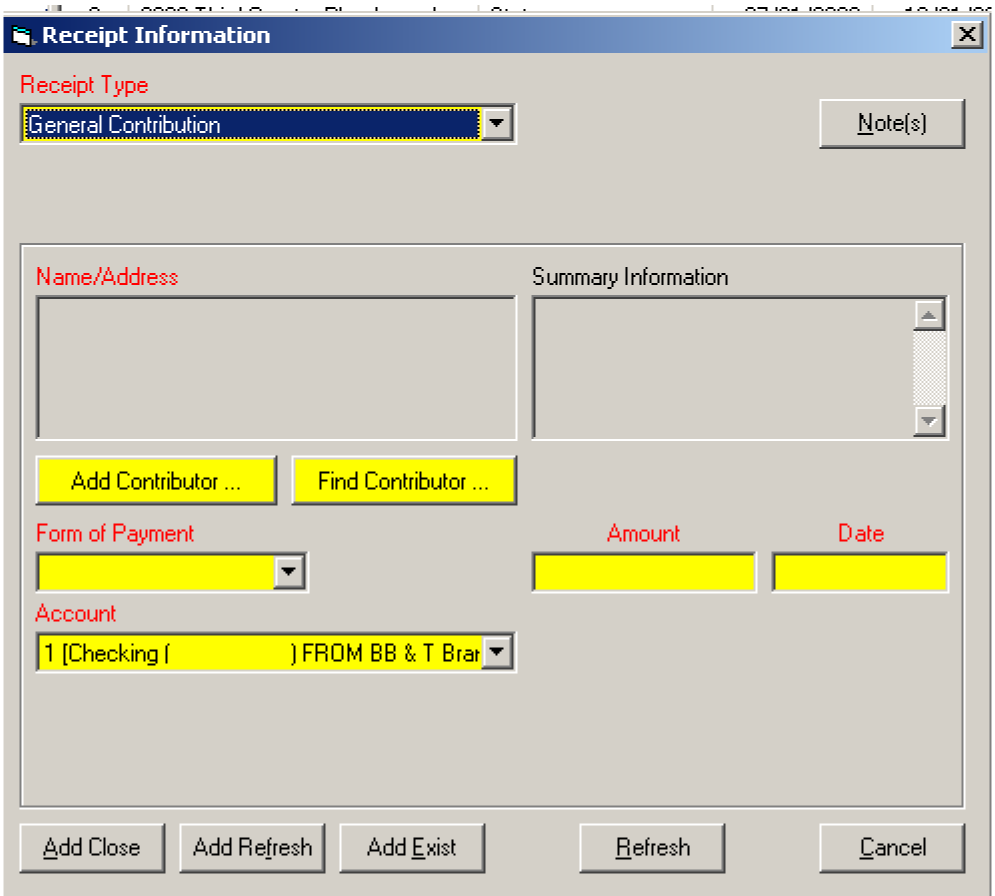


2. Then click **Add New**.



Adding Receipts – cont.

3. Click on the drop **down arrow** and select the receipt type that you would like to enter. *

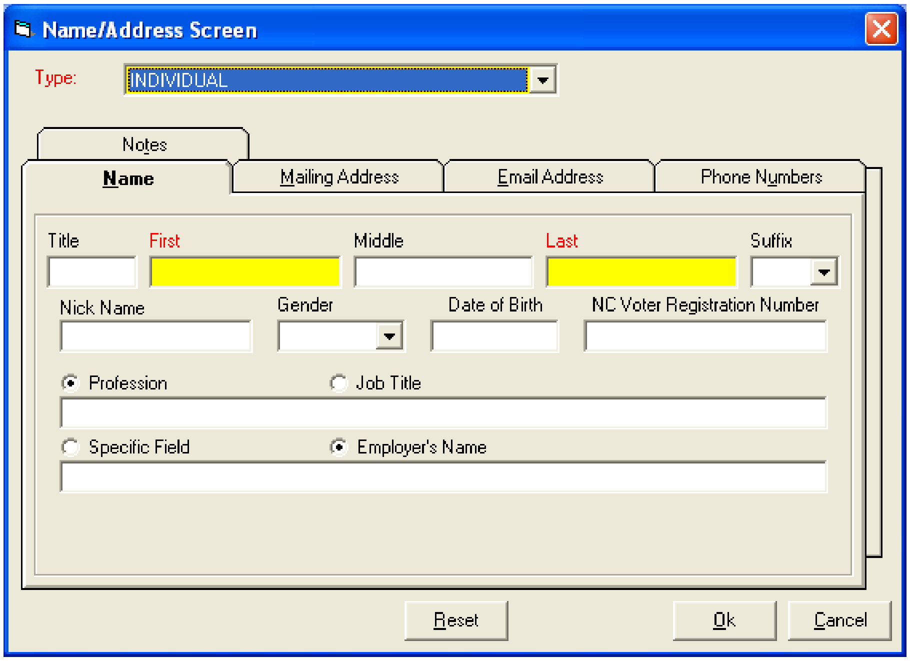


* The receipts below are receipt types that must be linked to other items in the software (i.e. a debt payment receipt must be linked to a debt). Please see the section of this Quick Start User Guide that refers to the special types of receipts.

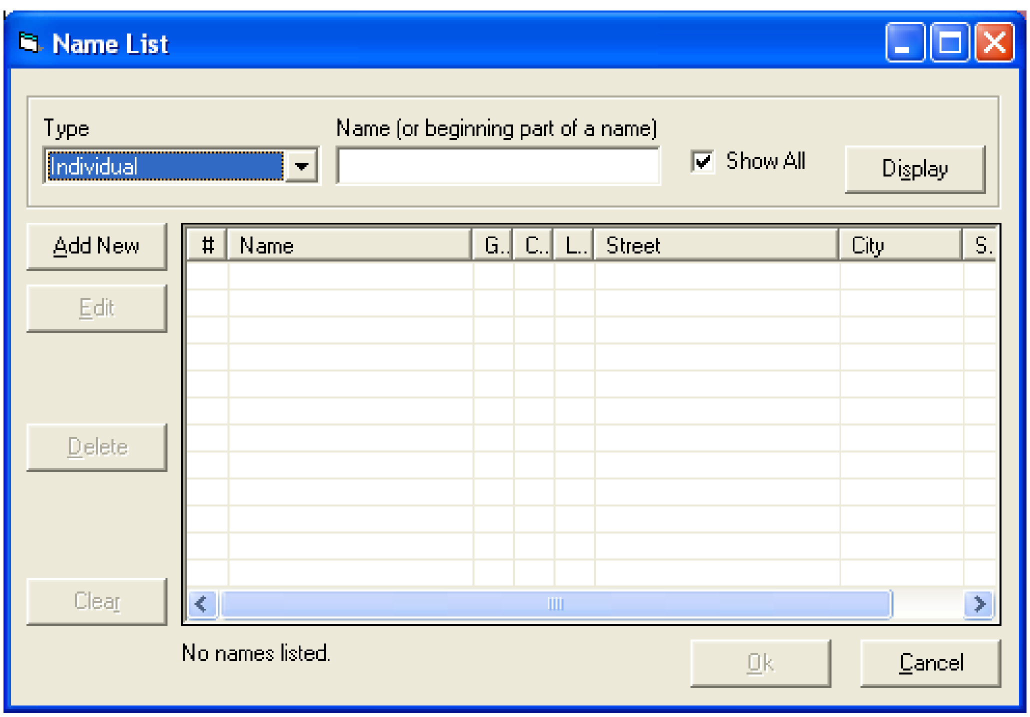
Type	Guide Page
Debt Payment	49
Forgiven Loan	57
Refund/Reimbursement	62

Adding Receipts – cont.

4. Click **Add Contributor** (see screen shot page 38) for a new contributor and you will see the following screen. For each tab (**Name, Mailing Address, Email Address, Phone Numbers, Notes)** enter any required information and any additional information you have and click **OK**.

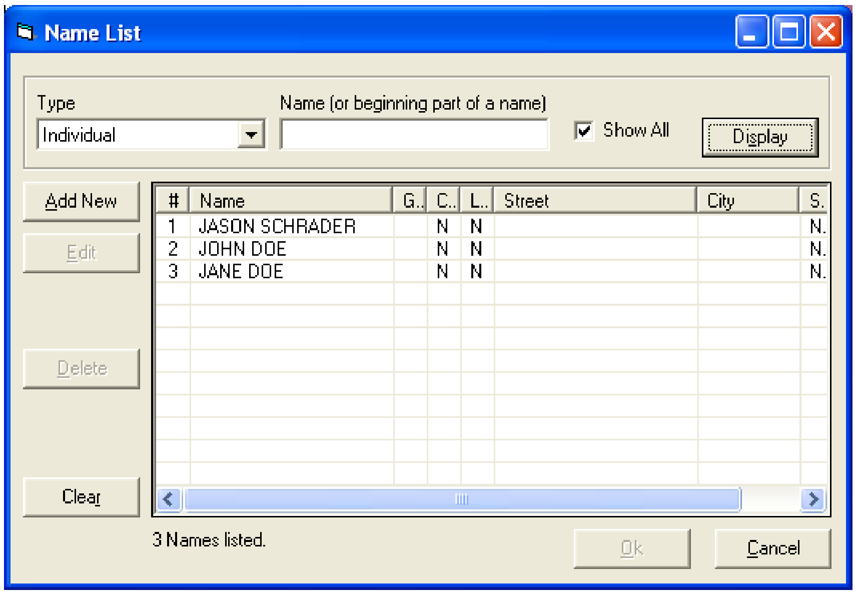


Click **Find Contributor** (see screen shot page 38) to pull up an existing contributor.

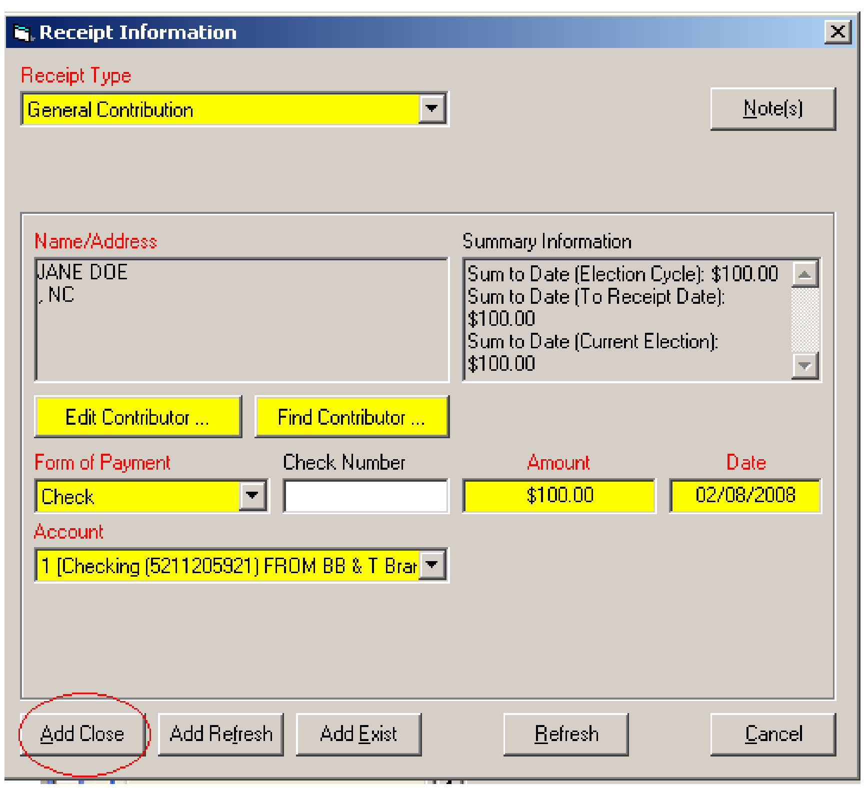


Adding Receipts – cont.

In the name field you can enter the person's last name to narrow down the list. Click **Display** to show the list. Select the contributor that you want to use and click **Ok**.

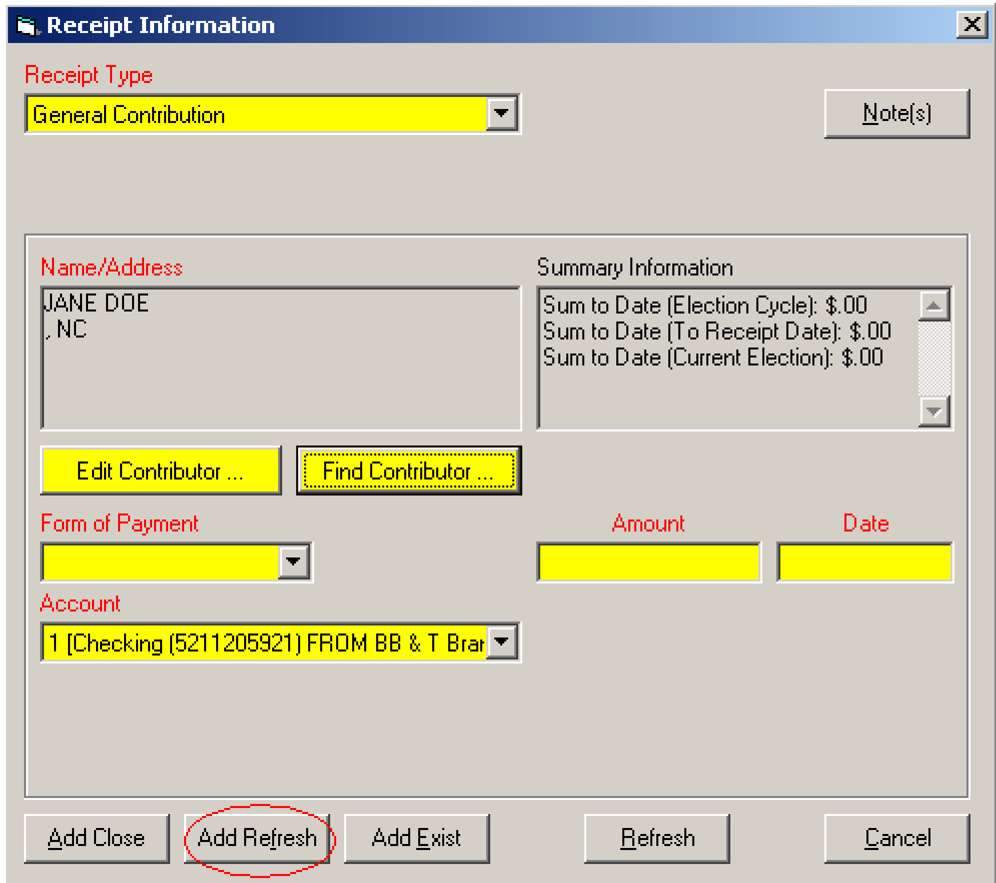


5. Once the contributor information is entered, you will need to enter any other required information for the receipt type you selected. Click **Add Close** to add the new receipt and close the window if there are no more contributions to report.



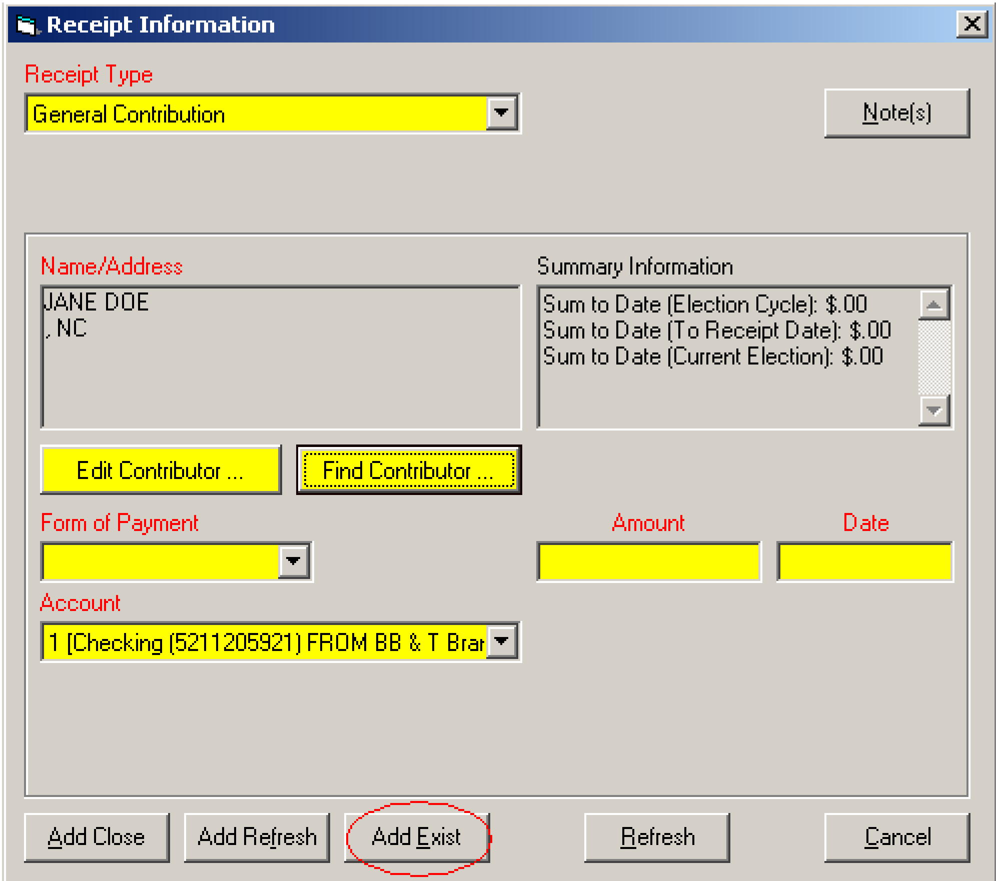
Adding Receipts – cont.

When you are entering multiple receipts click **Add Refresh**. When you have entered in all of your receipts, click **Cancel**.



When you are entering multiple receipts for the same contributor click **Add Exist**. When you have entered in all of your receipts, click **Cancel**.

Adding Receipts – cont.

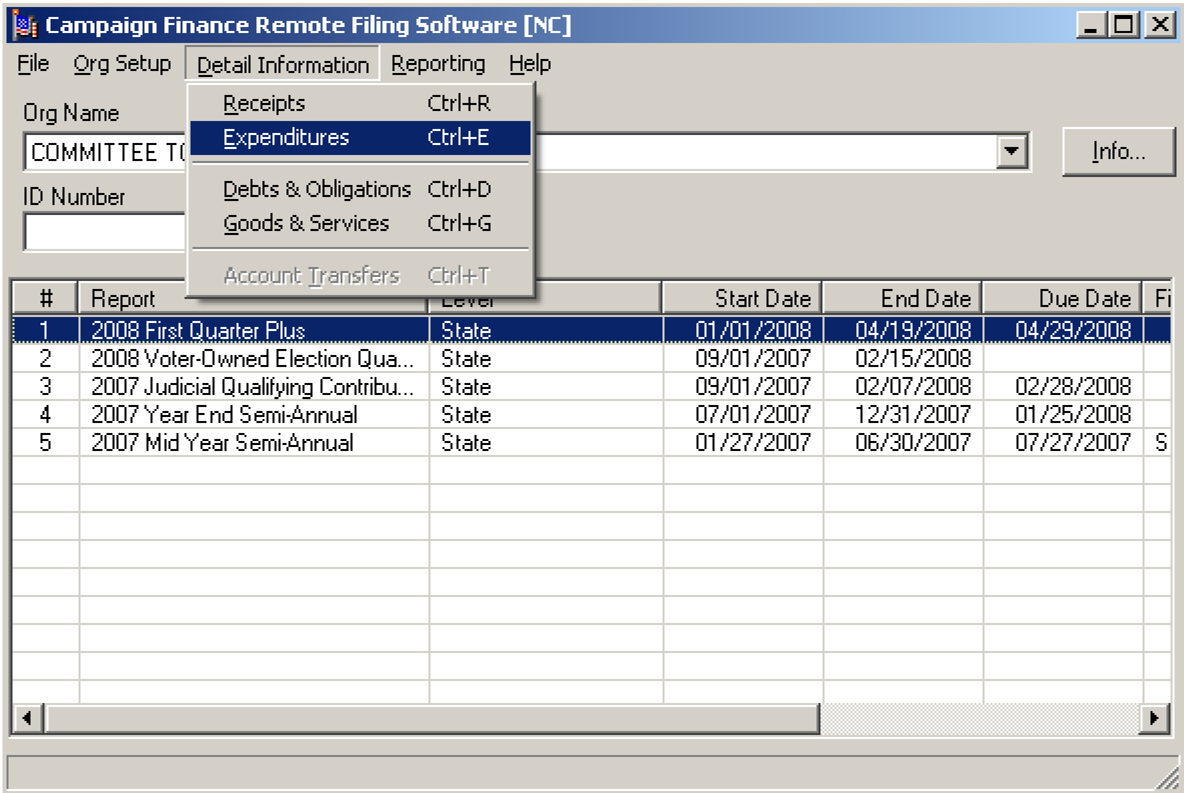


7. Your receipts will now show up in the list.
When you are finished entering in your receipts, click **Close.**

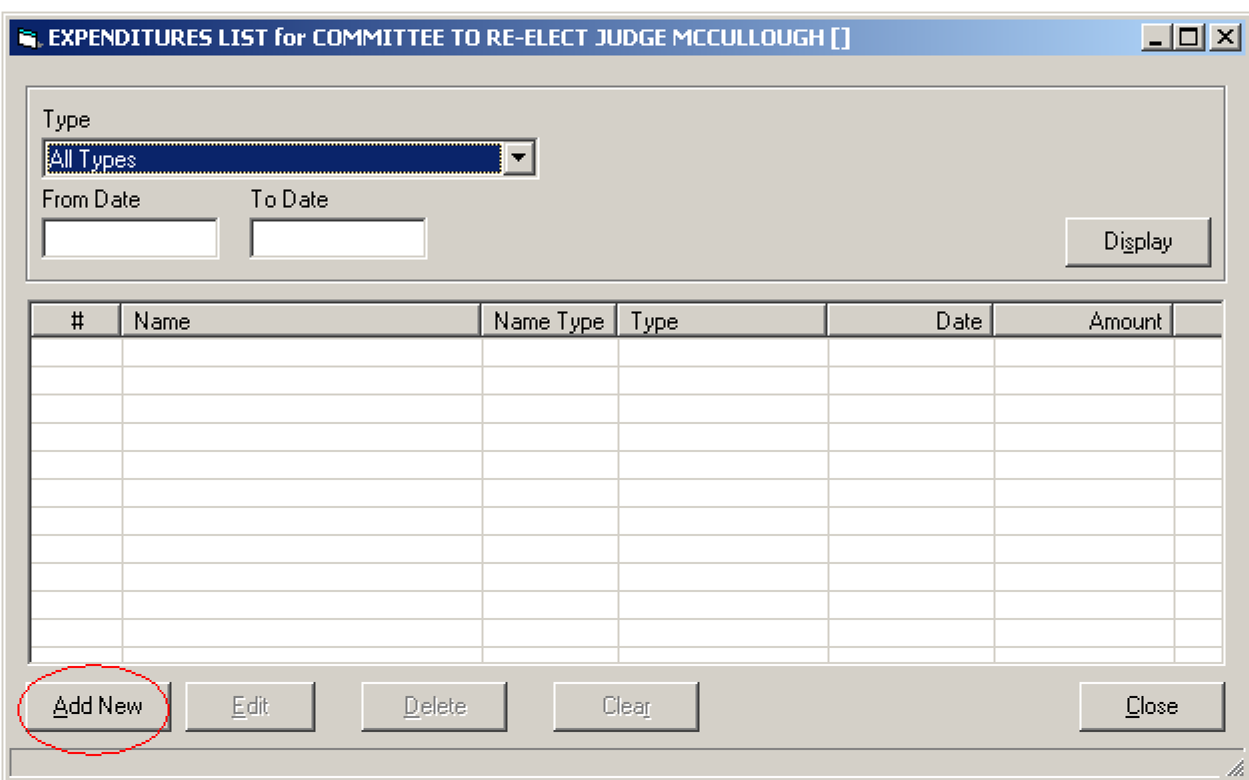
EXPENDITURES

Adding Expenditures

1. Click **Detail Information→ Expenditures**

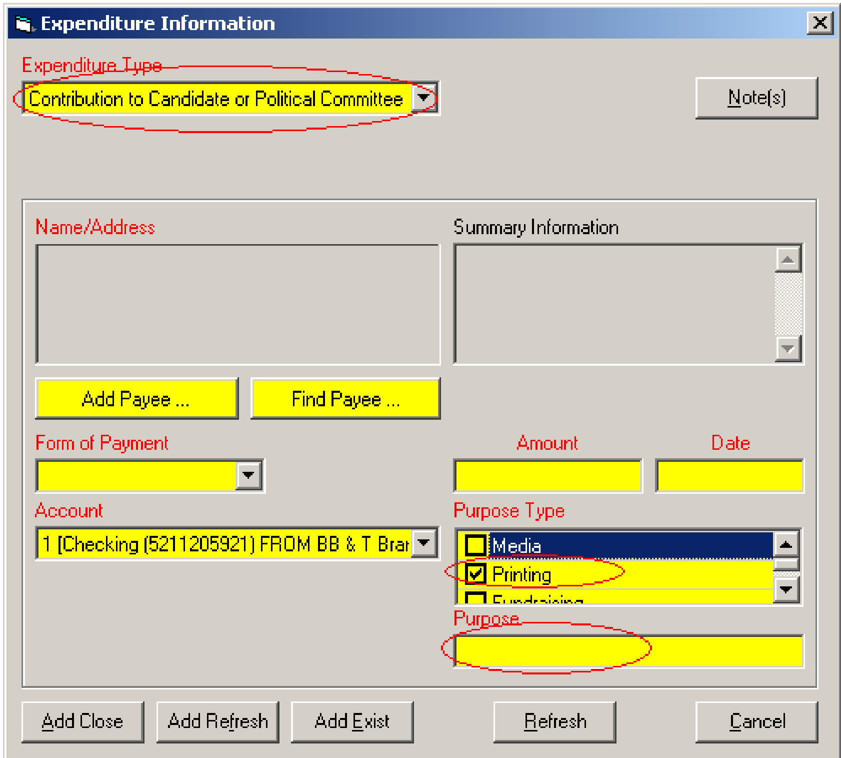


2. Click **Add New.**



Adding Expenditures – cont.

3. Click on the **down arrow** and select the expenditure type that you would like to enter. *



* *

* The expenditures below are expenditure types that must be linked to other items in the software (i.e. debt payment expenditure must be linked to a debt). Please see the section of this Quick Start User Guide that refers to the special types of expenditures.

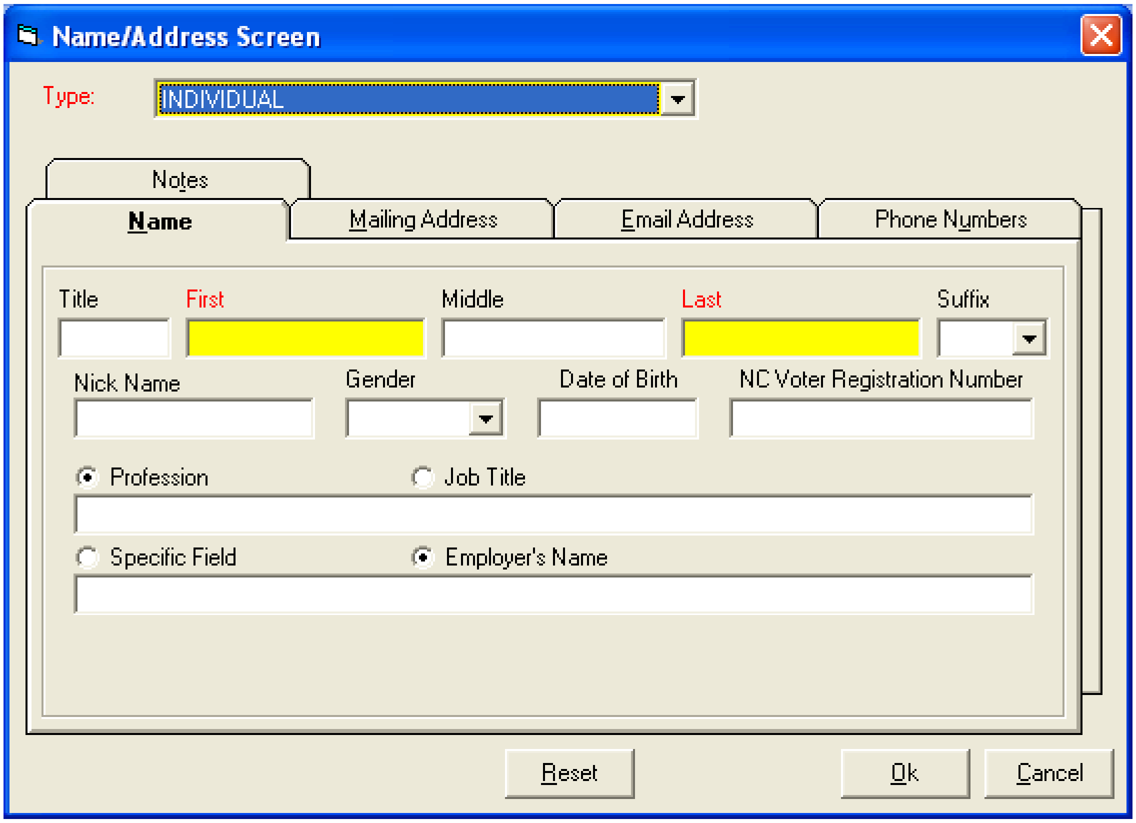
Type	Guide Page
Debt Payment	49
Loan Repayment	59
Refund/Reimbursement from the Committee	64
Coordinated Party Expenditure	66

**As of 2007 the following Expenditures will have a Purpose Type associated with them (older expenditures will still have the single purpose field)

• Contribution to Candidate or Political Committee • Coordinated Party Expense • Debt Payment • Operating Expense	**Media, Printing, Fundraising, To Another Candidate, Salaries, Equipment, Political Party, Penalties, Holding Public Office Expense, Postage, Office Expenses, Other**
• Refund/Reimbursement from the committee	**Returned to Contributor, Overpayment of Service, Exceeded contribution Limit, Other**

Adding Expenditures – cont.

For each tab (**Name, Mailing Address, Email Address, Phone Numbers, Notes)** enter any required information and any additional information you have and click **OK**.



5. Once the payee information is entered, you will need to enter any other required information for the expenditure type you selected.

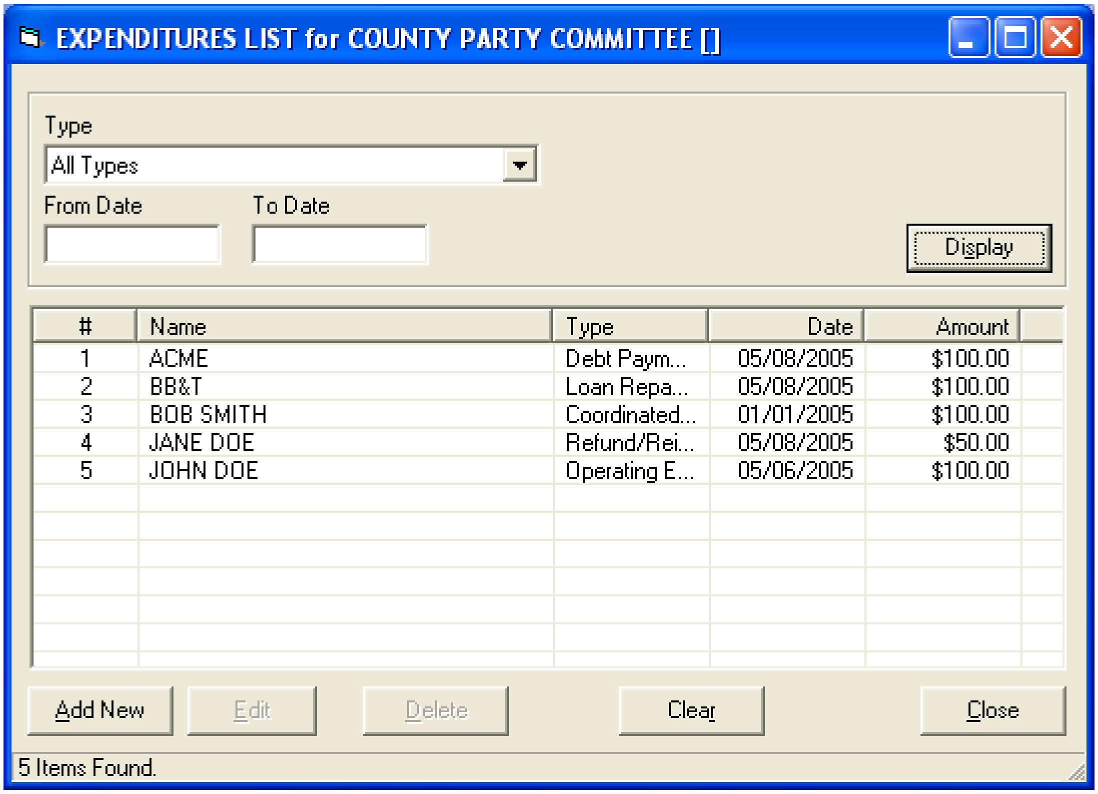
Click **Add Close** to add the new expenditure and close the window if there are no more expenditures to report.

When you are entering multiple expenditures click **Add Refresh**. When you have entered in all of your expenditures, click **Cancel**.

When you are entering multiple expenditures for the same payee click **Add Exist**. When you have entered in all of your expenditures, click **Cancel**.

Adding Expenditures – cont.

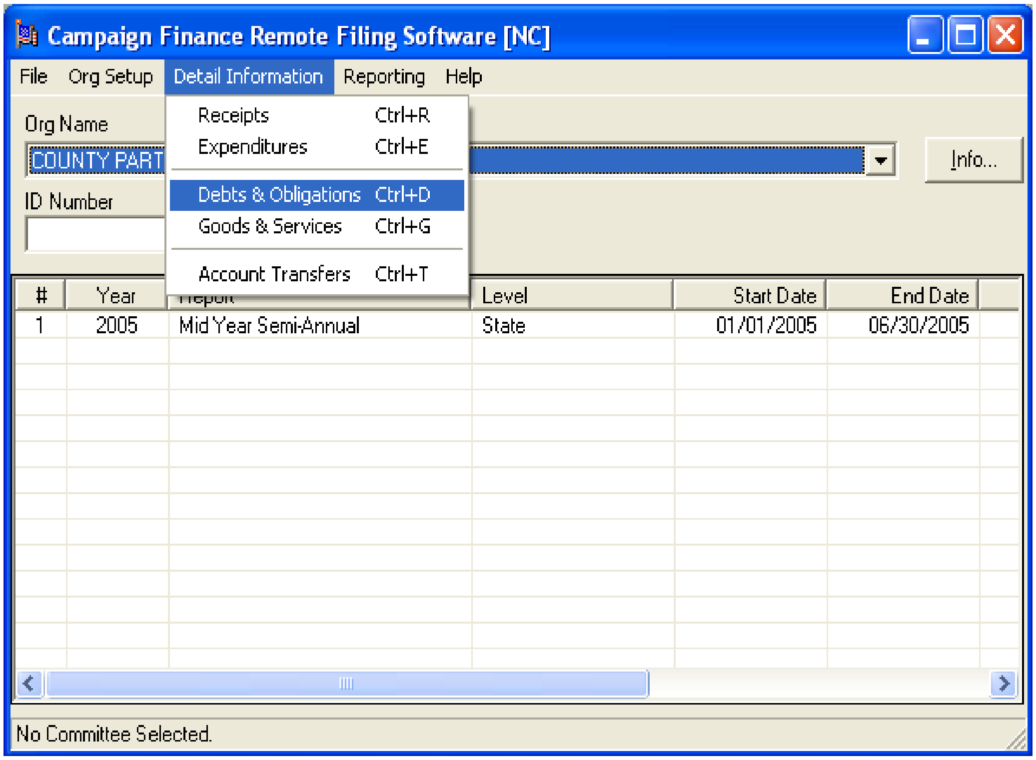
6. Your expenditures will now show up in the list.
When you are finished entering in your expenditures, click **Close.**



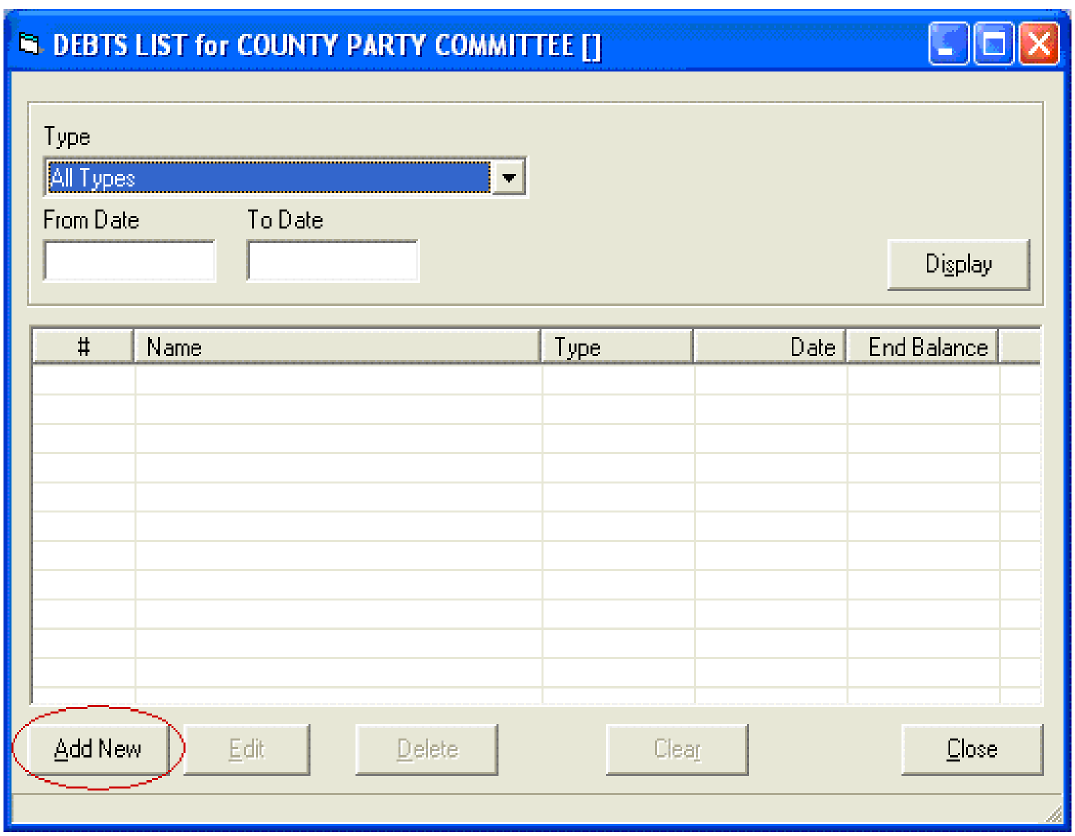
DEBTS

Adding Debts

1. Click **Detail Information> Debts & Obligations**

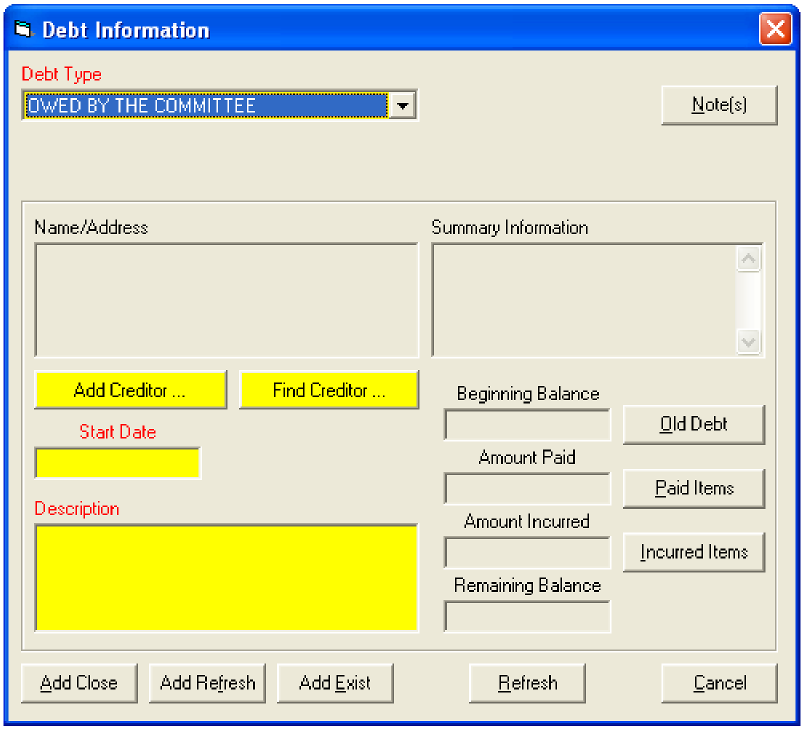


2. Click **Add New.**



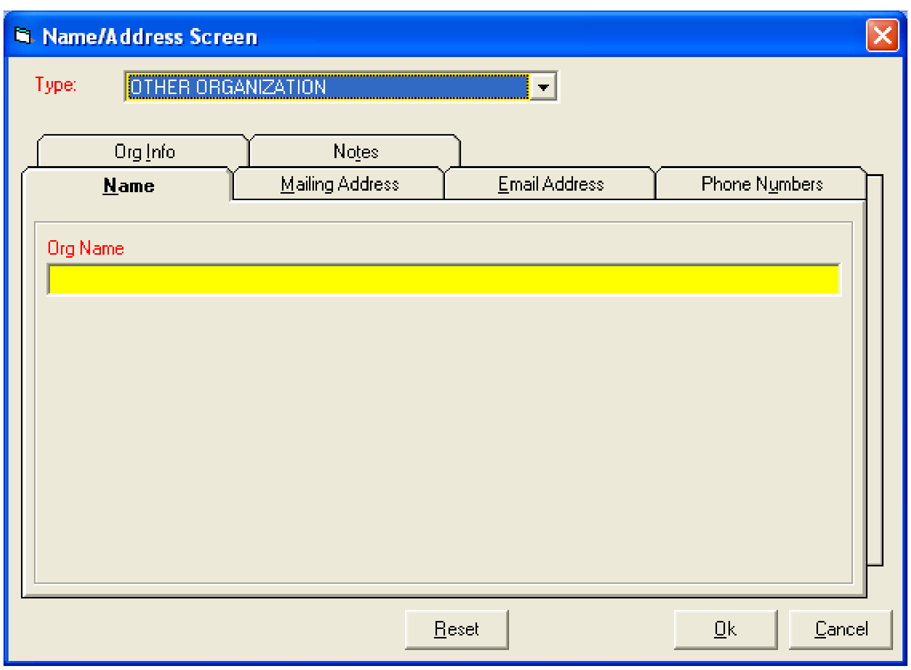
Adding Debts – cont.

3. Click on the **down arrow** and select the debt type that you would like to enter.



4. Click **Add Creditor** and you will see the following screen.

For each tab (**Name, Mailing Address, Email Address, Phone Numbers, Org Info, Notes)** enter any required information and any additional information you have and click **OK**.



Adding Debts – cont.

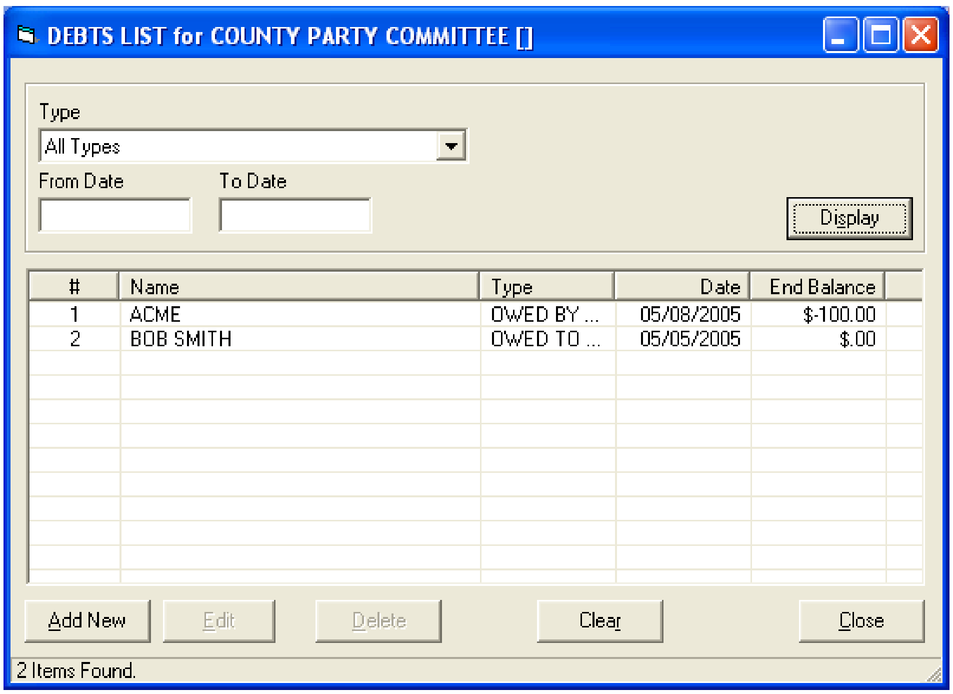
5. Once the Creditor information is entered, you will need to enter any other required information for the Debt type you selected.

Click **Add Close** to add the new Debt and close the window if there are no more debts to report.

When you are entering multiple Debts click **Add Refresh**. When you have entered in all of your debts, click **Cancel**.

When you are entering multiple Debts for the same Creditor click **Add Exist**. When you have entered in all of your debts, click **Cancel**.

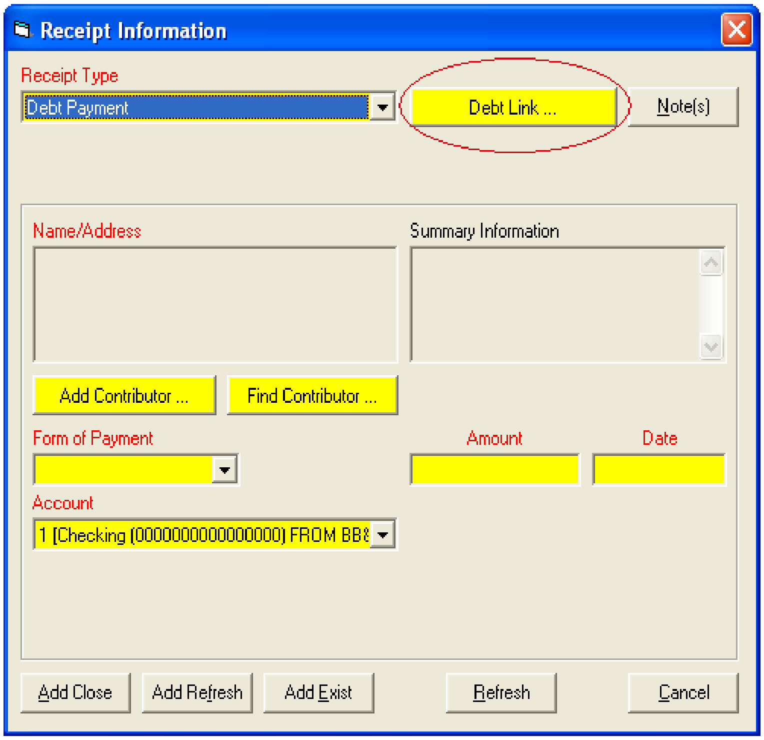
6. Your Debts will now show up in the list.
When you are finished entering in your Debts, click **Close.**



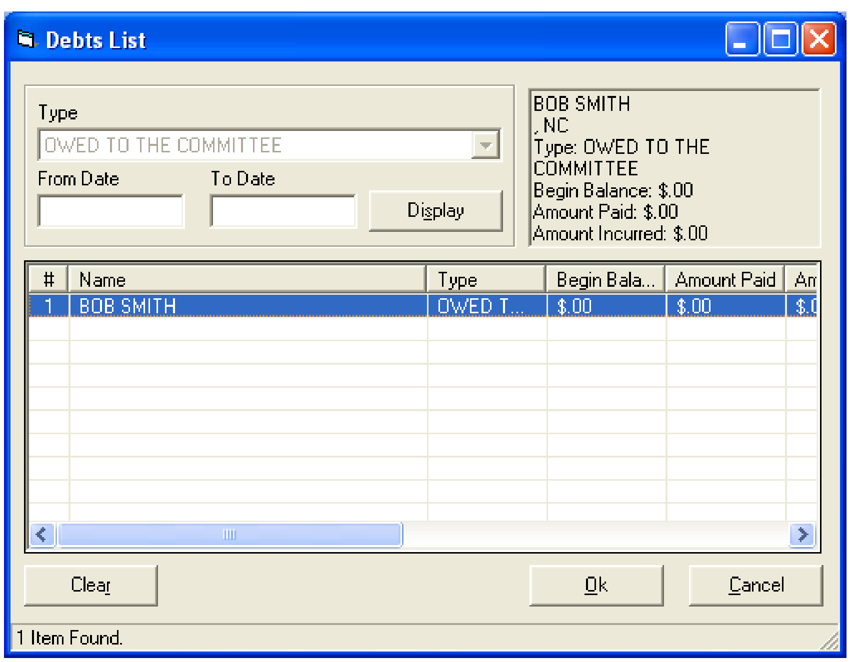
Linking a Debt to a Receipt

This is used to show a debt payment to the committee as a receipt. You must link this receipt to a debt.

1. From the receipt entry screen click **Debt Link**.

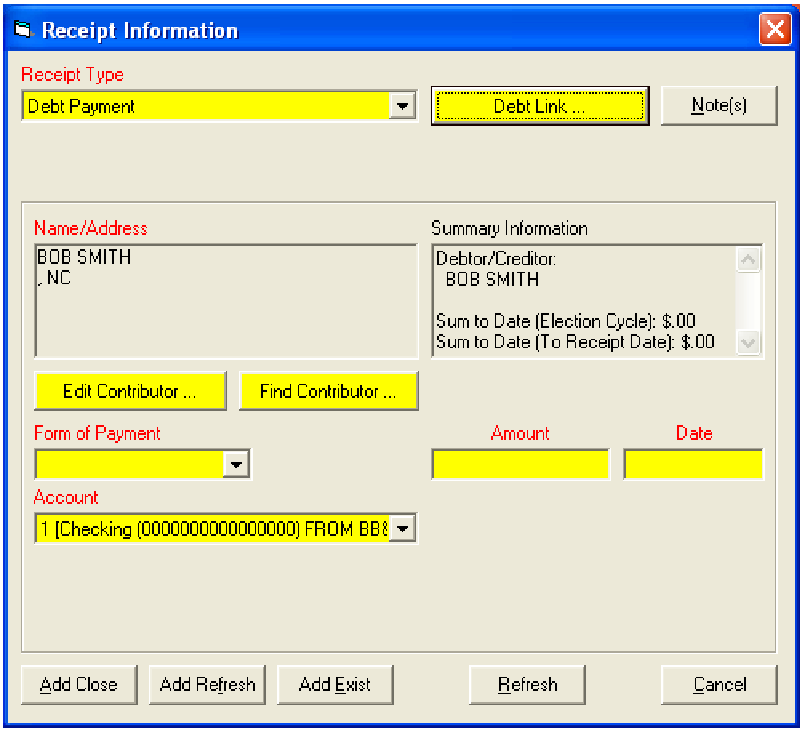


1. Click **Display** to display the list of debts. If there is no Debt listed refer to page 50 of this user guide to set up the Debt. Select the debt to link and click **Ok**.



Linking a Debt to a Receipt – cont.

3. The selected debt will now appear on the receipt form in the **Summary Information** box. Enter any other required information for the receipt.



Click **Add Close** to add the new Receipt and close the window if there are no more receipts to report for the linked debt.

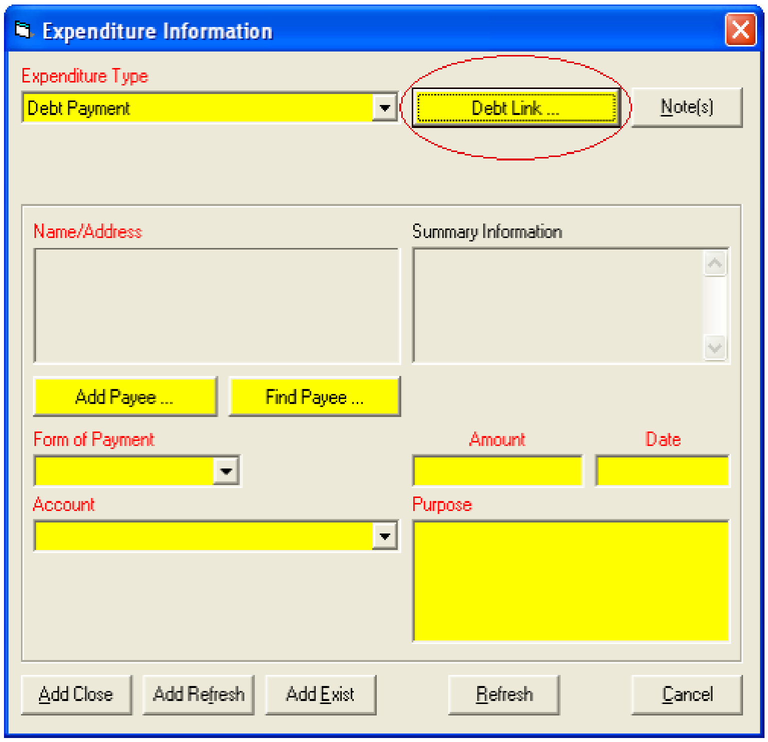
When you are entering multiple receipts click **Add Refresh**. When you have entered in all of your receipts for the linked debt, click **Cancel**.

When you are entering multiple receipts for the same contributor click **Add Exist**. When you have entered in all of your receipts for the linked debt, click **Cancel**.

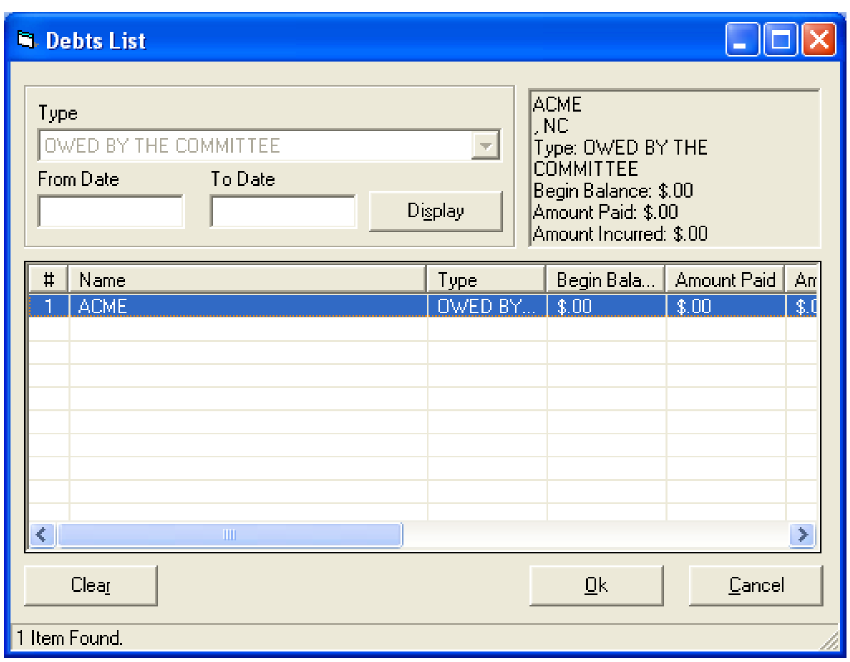
Linking a Debt to an Expenditure

This is used to show a debt payment from the committee as an expenditure. You must link this expenditure to a debt.

1. From the expenditure entry screen click **Debt Link**.

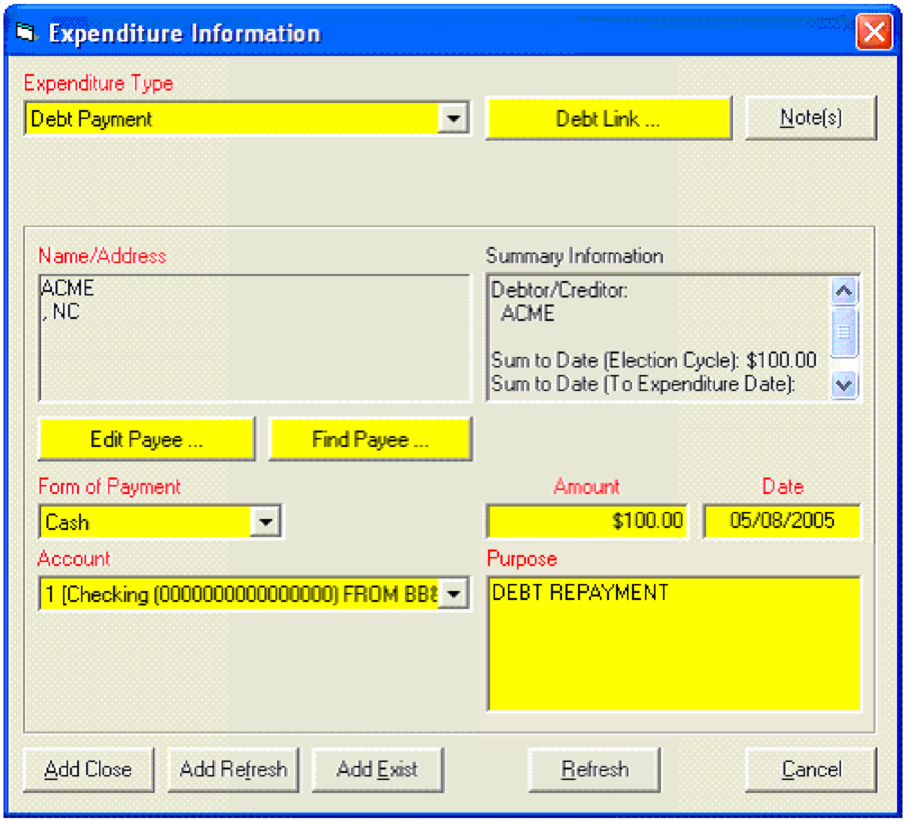


2. Click **Display** to display the list of debts. If there is no Debt listed refer to page 50 of this user guide to set up the debt. Select the Debt to link and click **Ok**.



Linking a Debt to an Expenditure – cont.

3. The selected debt will now appear on the expenditure form in the **Summary Information** box. Enter any other required information for the expenditure.



Click **Add Close** to add the new Expenditure and close the window if there are no more expenditures to report for the linked debt.

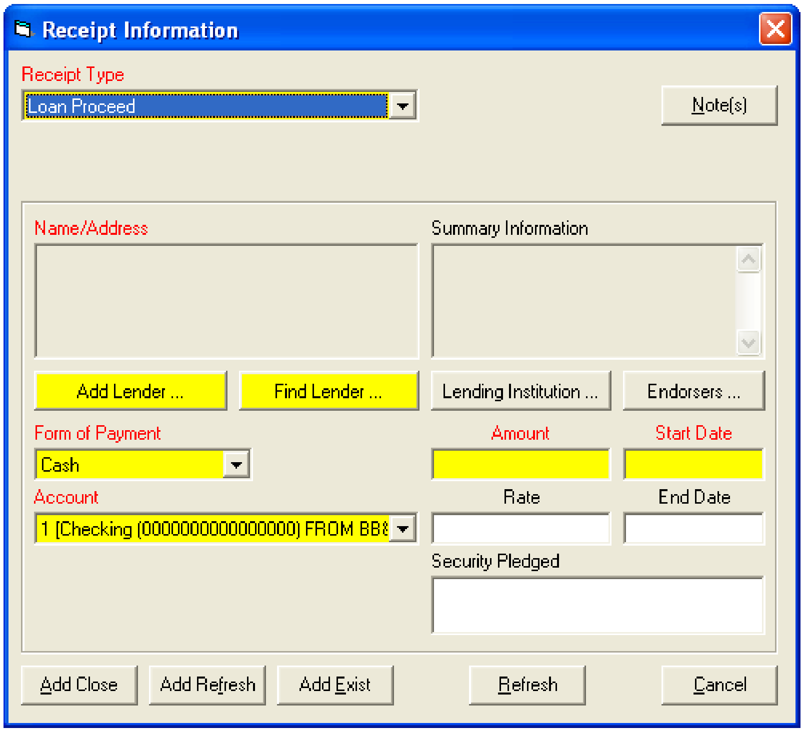
When you are entering multiple expenditures click **Add Refresh**. When you have entered in all of your expenditures for the linked debt, click **Cancel**.

When you are entering multiple expenditures for the same payee click **Add Exist**. When you have entered in all of your expenditures for the linked debt, click **Cancel**.

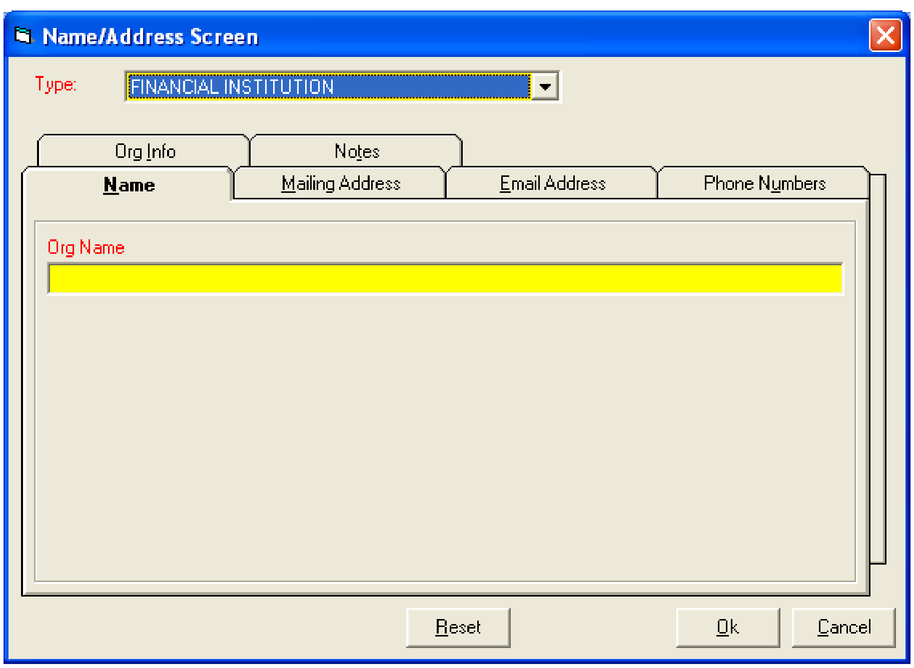
LOANS

Adding Loans

Candidate Committees may receive loans from individuals and other entities allowed to make contributions. Loans are contributions and are subject to the same limitations as contributions.

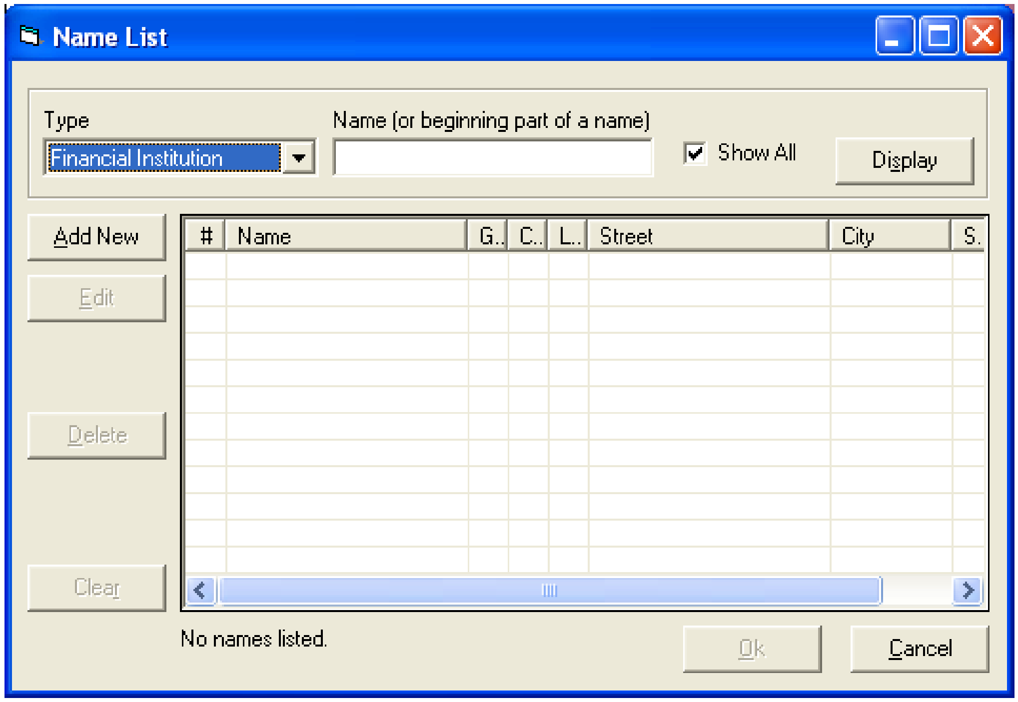


1. Click **Add Lender** (see above) for a new lender and you will see the following screen. For each tab (**Name, Mailing Address, Email Address, Phone Numbers, Org Info, Notes)** enter any required information and any additional information you have and click **OK**.

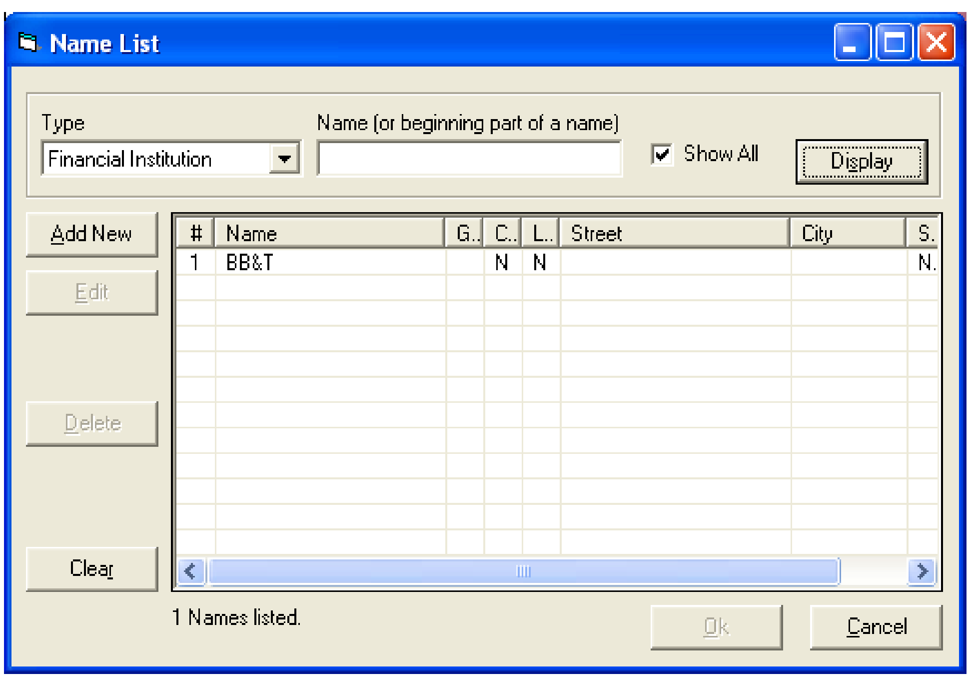


Adding Loans – cont.

Click **Find Lender** (see page 58) to pull up an existing lender.

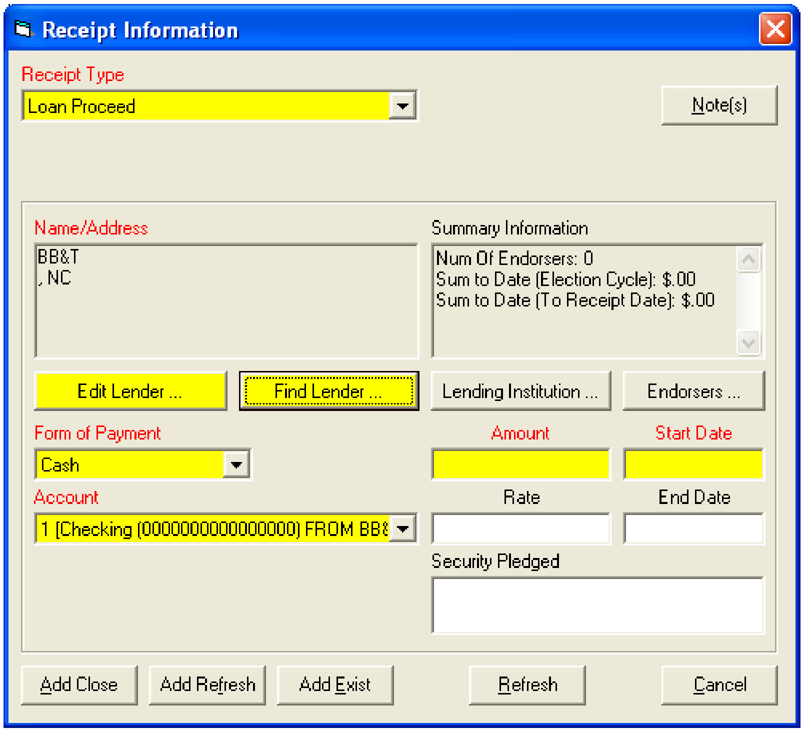


In the name field you can enter the lender's name to narrow down the list. Click **Display** to show the list. Select the lender that you want to use and click **Ok**.



Adding Loans – cont.

2. The selected lender will now appear on the receipt. Enter any other required information for the receipt.



Click **Add Close** to add the new Receipt and close the window if there are no more receipts to report for the loan.

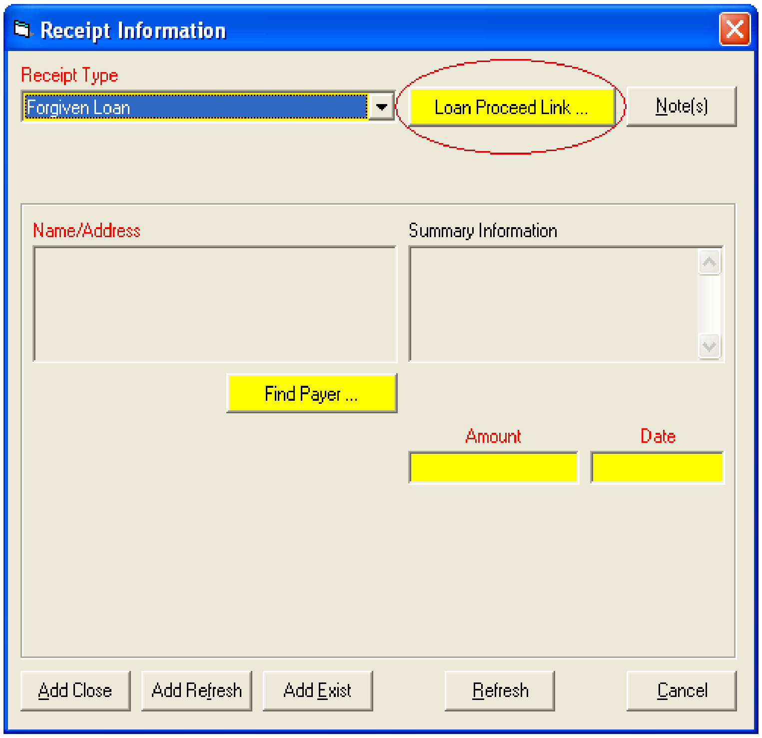
When you are entering multiple receipts click **Add Refresh**. When you have entered in all of your receipts for the loan, click **Cancel**.

When you are entering multiple receipts for the same lender click **Add Exist**. When you have entered in all of your receipts for the loan, click **Cancel**.

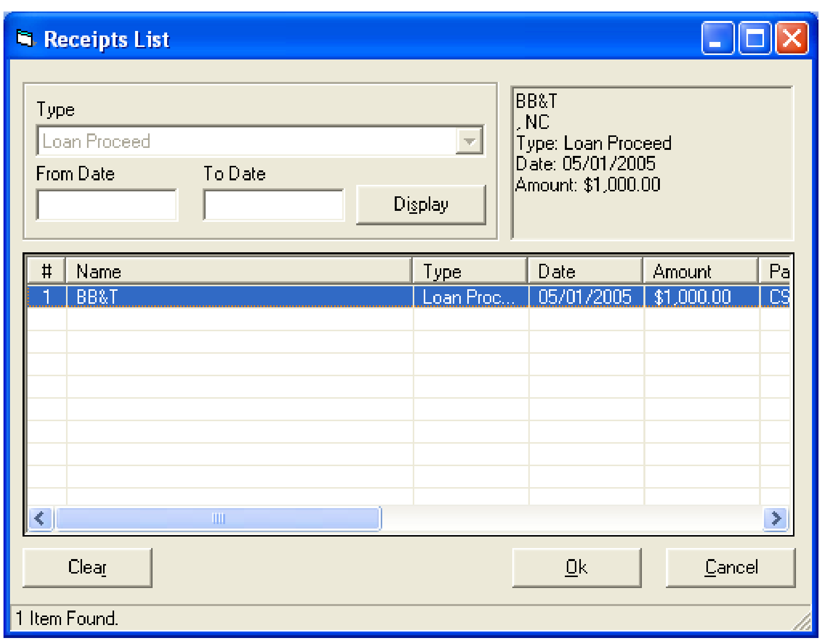
Linking a Loan Proceed to a Receipt

This is used if a committee has an outstanding loan that is owed TO the committee. You must link this receipt to the loan.

1. From the receipt entry screen click **Loan Proceed Link**.

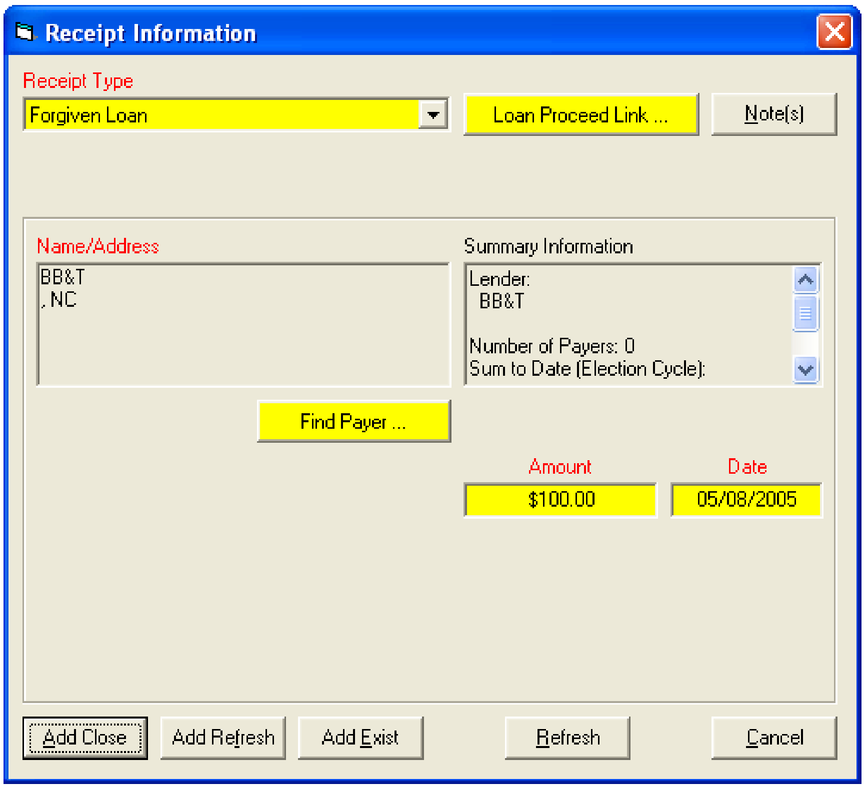


2. Click **Display** to display the list of loan proceeds. If there is no Loan Proceed listed refer to page 58 of this user guide to set up the Loan Proceed. Select the loan proceed to link and click **Ok**.



Linking a Loan Proceed to a Receipt – cont.

3. The selected loan proceed will now appear on the receipt form in the **Summary Information** box. Enter any other required information for the receipt.



Click **Add Close** to add the new Receipt and close the window if there are no more receipts to report for the linked loan proceed.

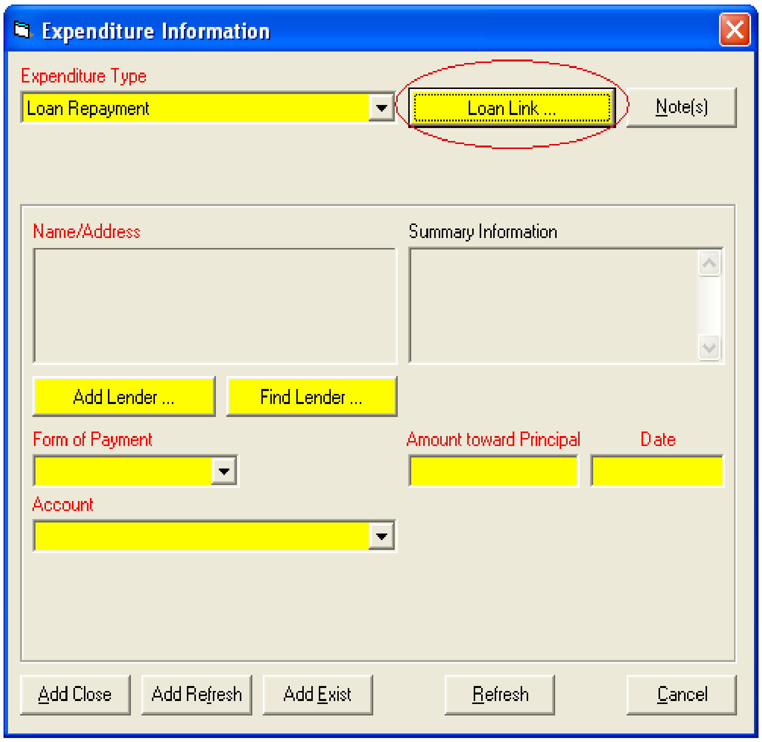
When you are entering multiple receipts click **Add Refresh**. When you have entered in all of your receipts for the linked loan proceed, click **Cancel**.

When you are entering multiple receipts for the same payer click **Add Exist**. When you have entered in all of your receipts for the linked loan proceed, click **Cancel**.

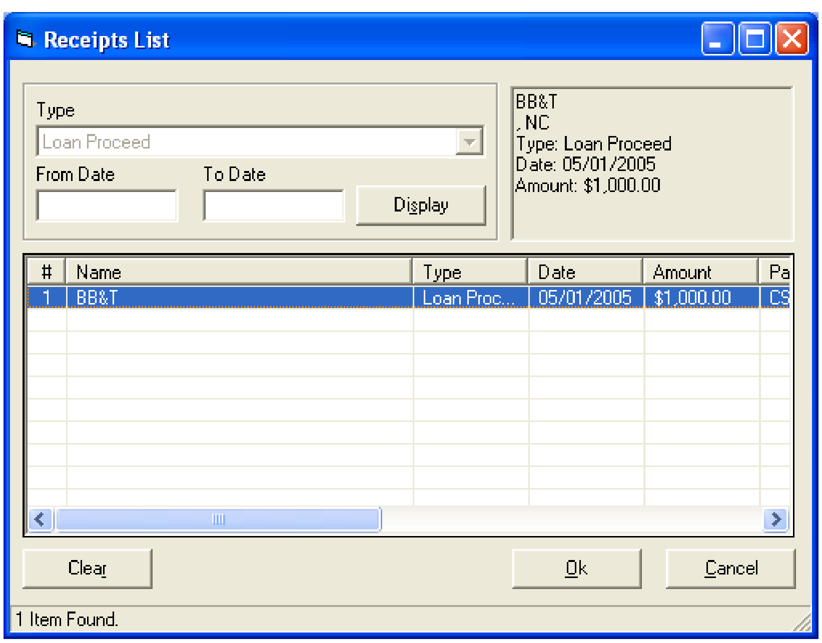
Linking a Loan Repayment to an Expenditure

This used if a committee has an outstanding loan that is owed BY the committee. You must link these expenditures to the loan.

1. From the expenditure entry screen click **Loan Link**.

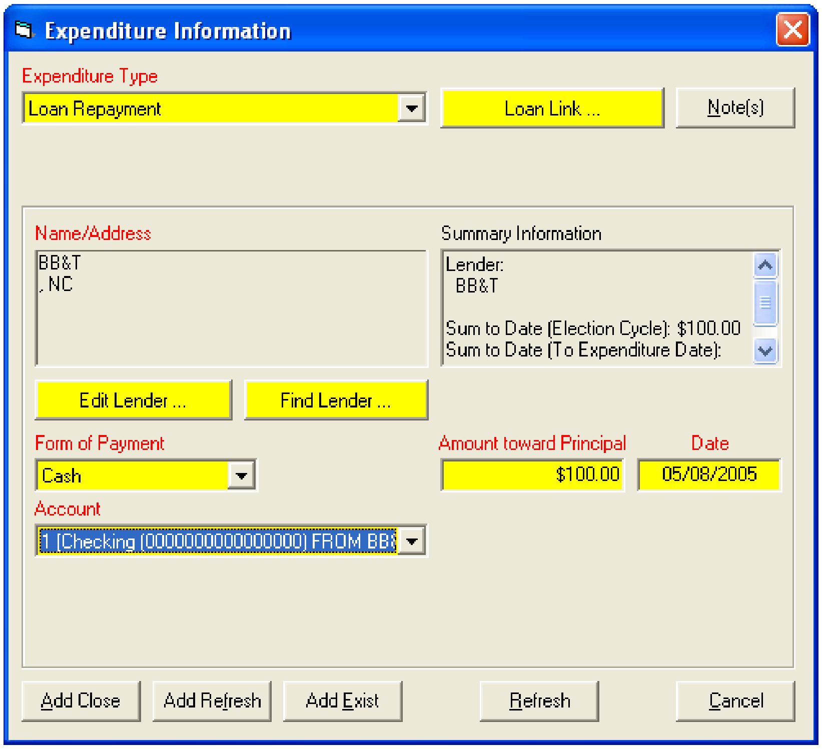


2. Click **Display** to display the list of loan proceeds. If there is no Loan Proceed listed refer to page 58 of this user guide to set up the Loan Proceed. Select the loan proceed to link and click **Ok**.



Linking a Loan Repayment to an Expenditure – cont.

3. The selected loan proceed will now appear on the expenditure form in the **Summary Information** box. Enter any other required information for the expenditure.



Click **Add Close** to add the new Expenditure and close the window if there are no more expenditures to report for the linked loan.

When you are entering multiple Expenditures click **Add Refresh**. When you have entered in all of your expenditures for the linked loan, click **Cancel**.

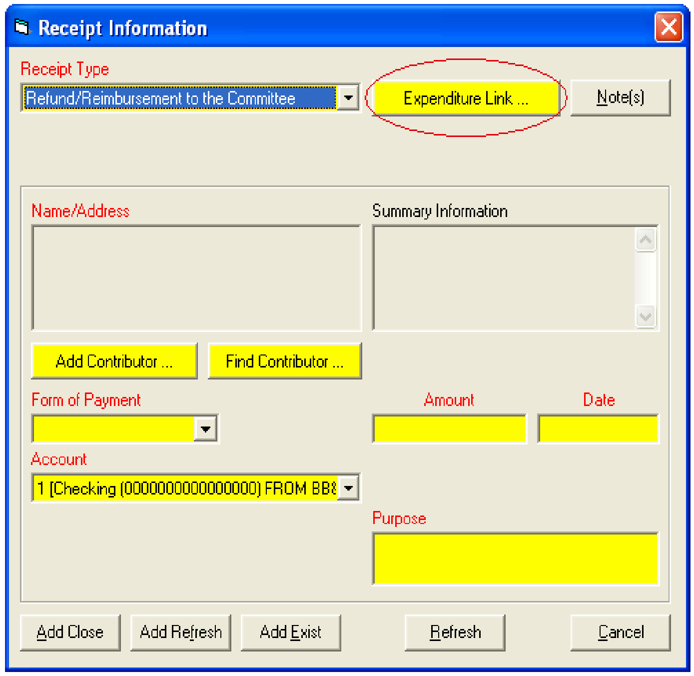
When you are entering multiple Expenditures for the same lender click **Add Exist**. When you have entered in all of your expenditures for the linked loan, click **Cancel**.

REFUNDS/COORDINATED PARTY EXPENDITURES

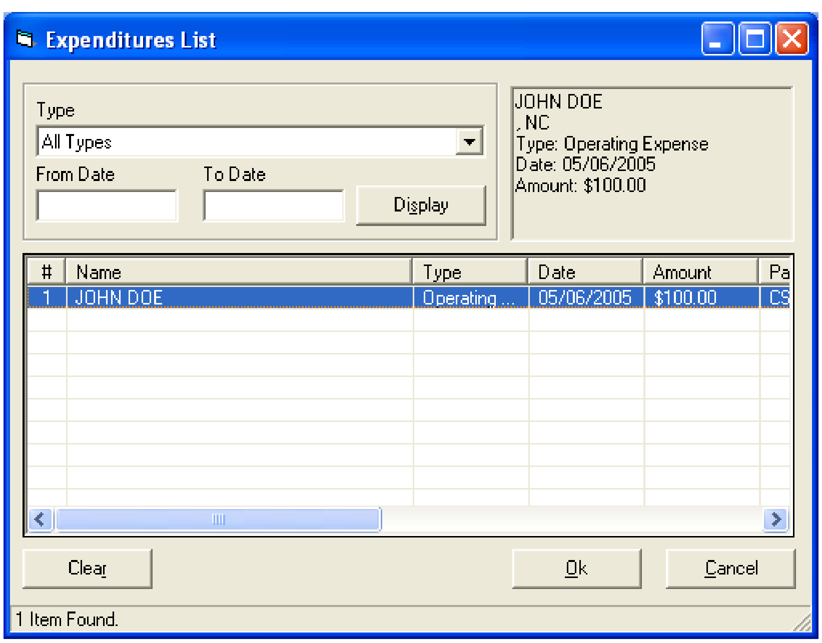
Linking an Expenditure to a Refund/Reimbursement Receipt

If money comes into the committee as a refund or a reimbursement then you must first show the expenditure that was paid BY the committee.

1. From the receipt entry screen click **Expenditure Link**.

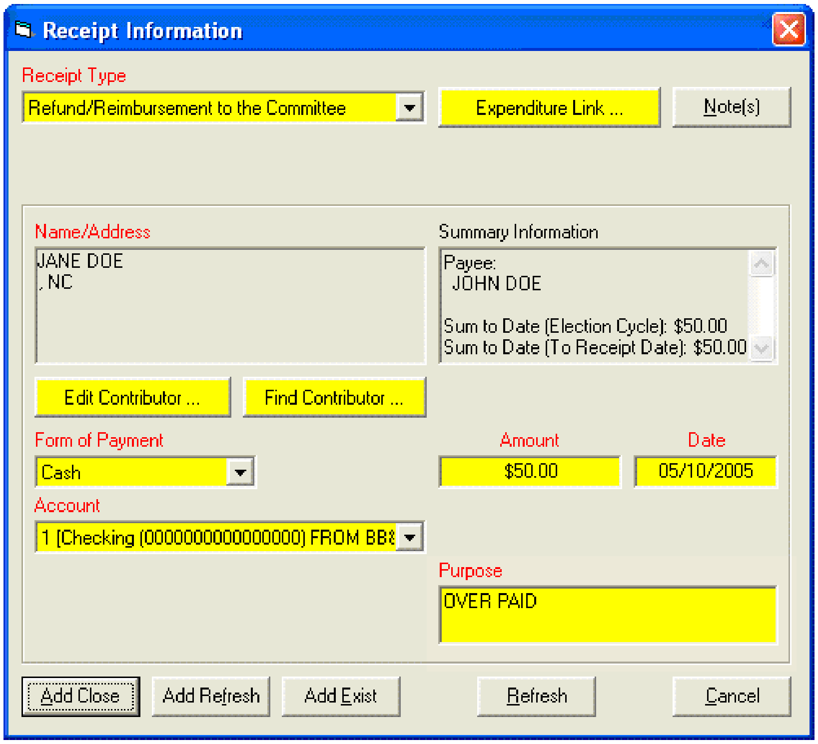


2. Click **Display** to display the list of expenditures. If there is no Expenditure listed refer to page 68 of this user guide to set up the Expenditure. Select the expenditure to link and click **Ok**.



Linking an Expenditure to a Refund/Reimbursement Receipt – cont.

3. The selected expenditure will now appear on the receipt form in the **Summary Information** box. Enter any other required information for the receipt.



Click **Add Close** to add the new Receipt and close the window if there are no more receipts to report for the linked expenditure.

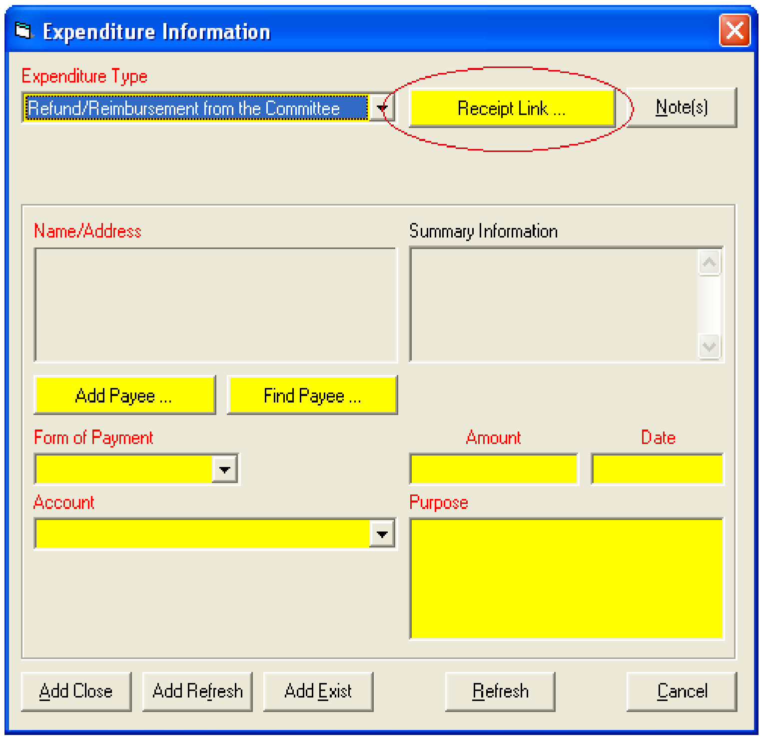
When you are entering multiple Receipts click **Add Refresh**. When you have entered in all of your receipts for the linked expenditure, click **Cancel**.

When you are entering multiple Receipts for the same Contributor click **Add Exist**. When you have entered in all of your receipts for the linked expenditure, click **Cancel**.

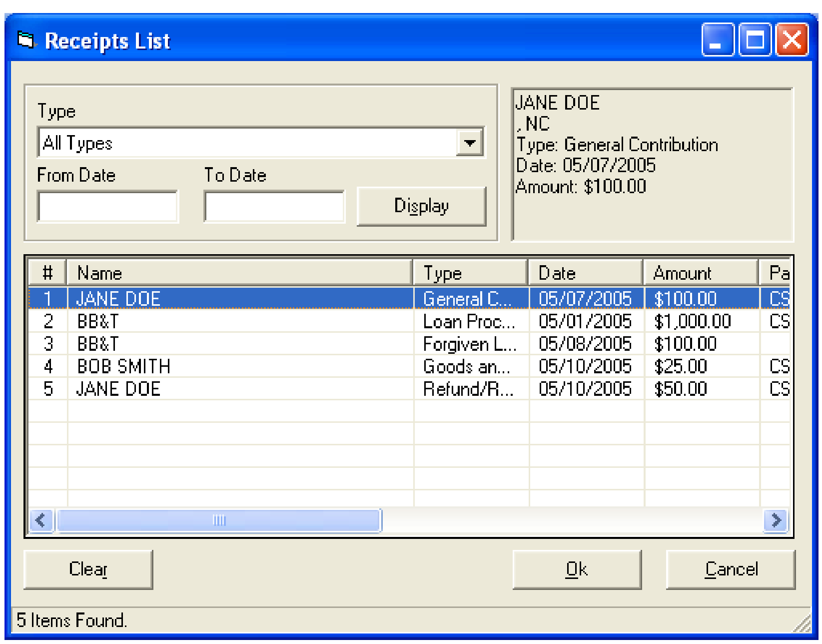
Linking a Receipt to a Refund/Reimbursement Expenditure

If the committee must refund or reimburse money then you must first show the contribution/receipt that was made TO the committee.

1. From the expenditure entry screen click **Receipt Link**.

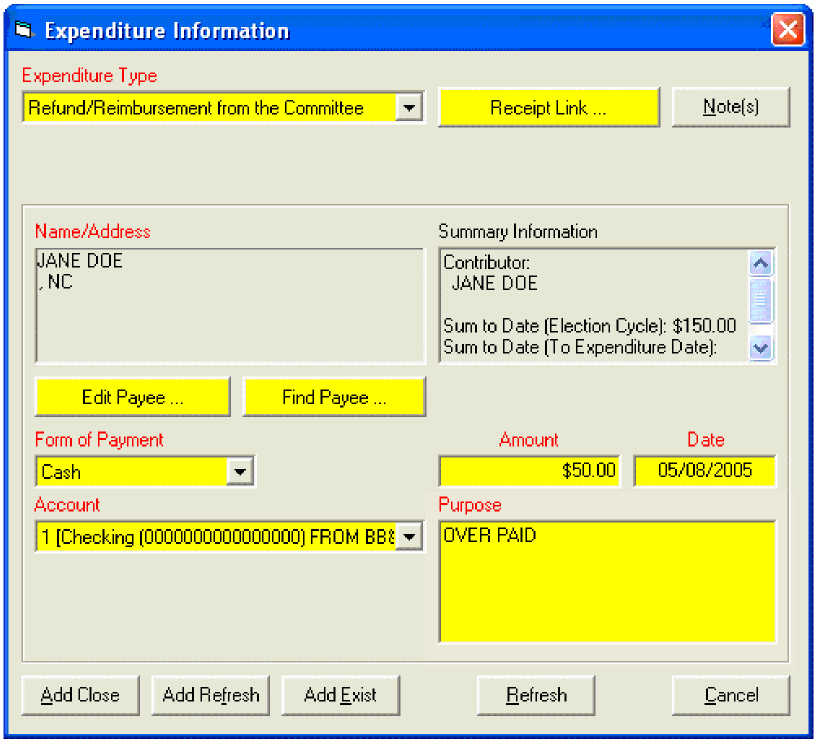


2. Click **Display** to display the list of receipts. If there is no Receipt listed refer to page 37 of this user guide to set up the Receipt. Select the receipt to link and click **Ok**.



Linking a Receipt to a Refund/Reimbursement Expenditure – cont.

3. The selected receipt will now appear on the expenditure form in the **Summary Information** box. Enter any other required information for the expenditure.



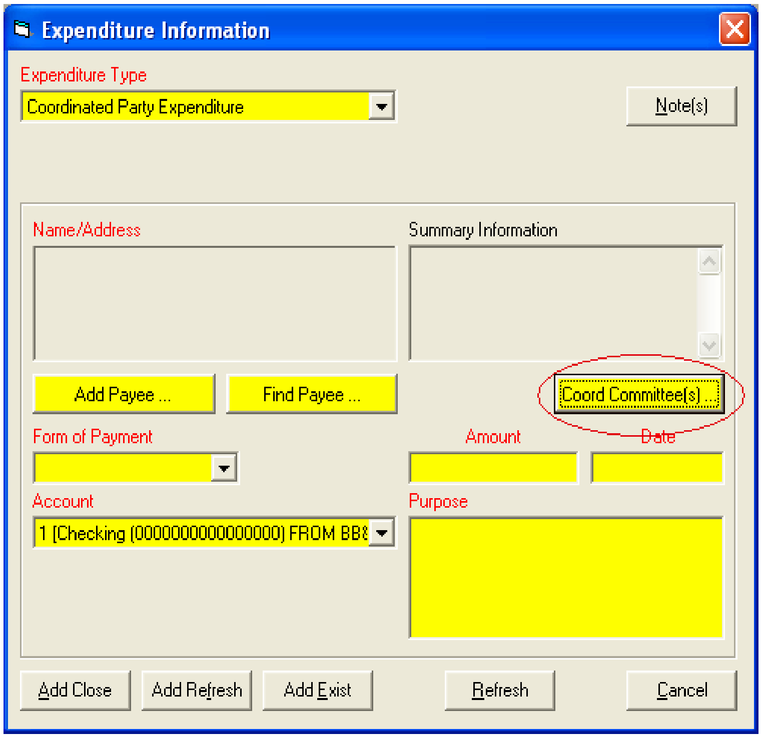
Click **Add Close** to add the new Expenditure and close the window if there are no more expenditures to report for the linked receipt.

When you are entering multiple Expenditures click **Add Refresh**. When you have entered in all of your expenditures for the linked receipt, click **Cancel**.

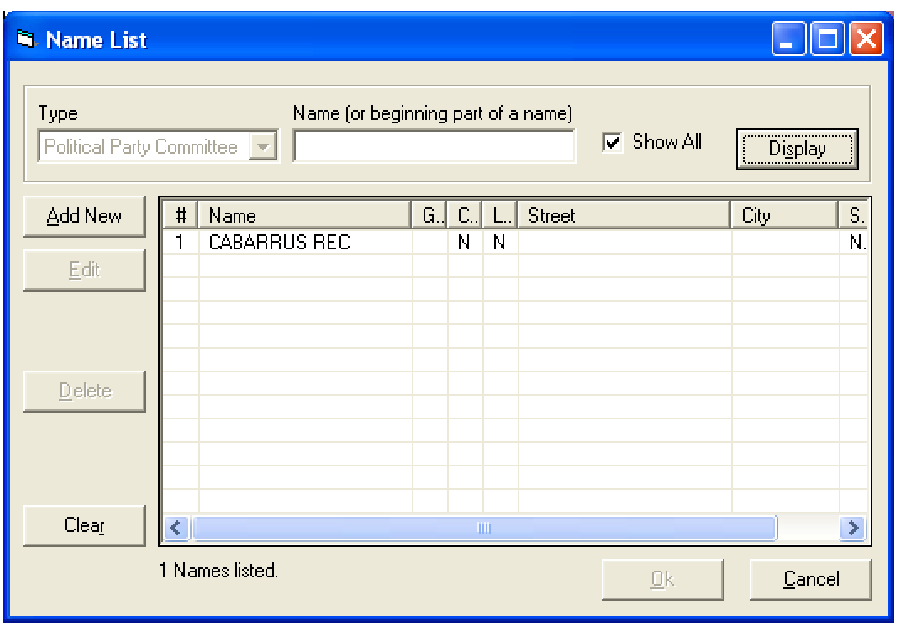
When you are entering multiple Expenditures for the same Payee click **Add Exist**. When you have entered in all of your expenditures for the linked receipt, click **Cancel**.

Linking a Coordinated Committee to a Coordinated Party Expenditure

1. From the receipt entry screen click **Coord Committee(s)**.

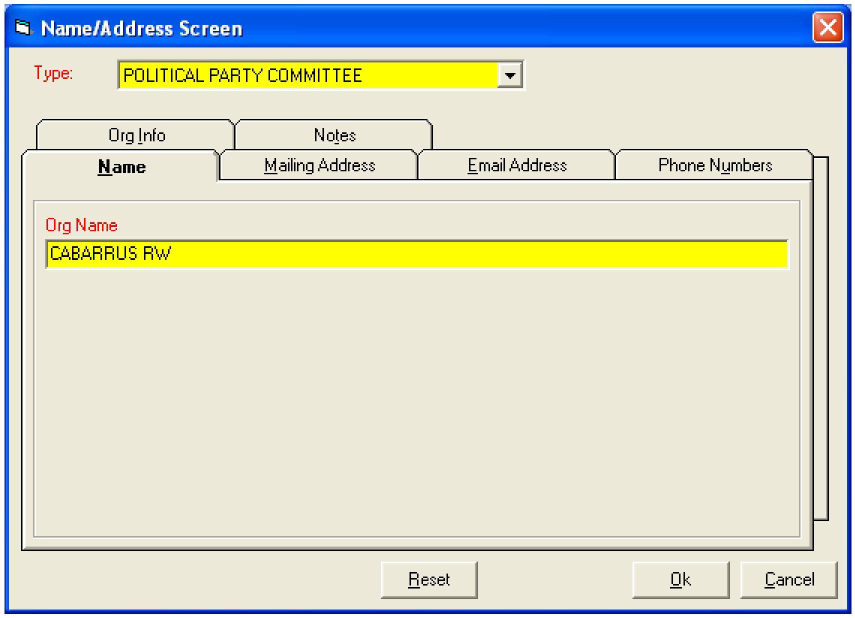


2. Click **Display** to display the list of party committees. Select the party committee to link and click **Ok**. If the required party committee is not found click **Add New**.

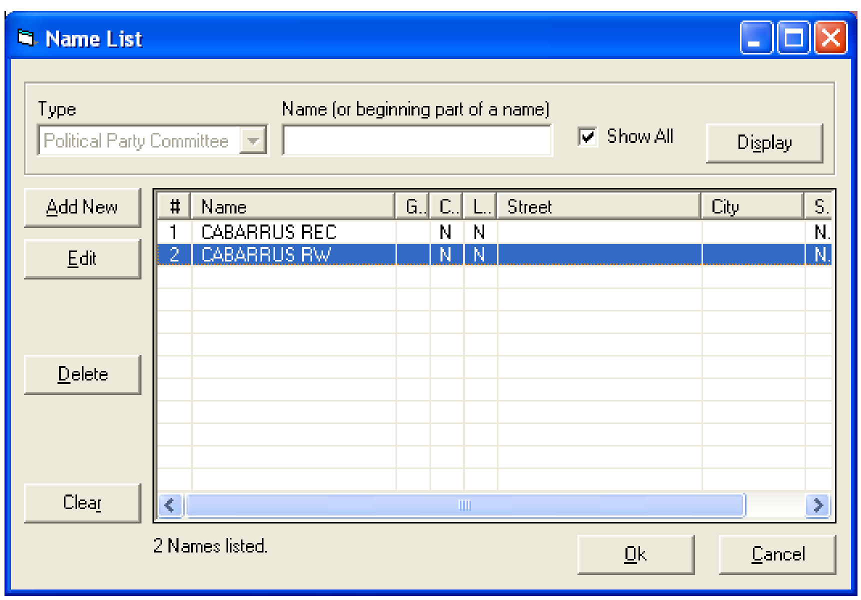


Linking a Coordinated Committee to a Coordinated Party Expenditure – cont.

3. For each tab (**Name, Mailing Address, Email Address, Phone Numbers, Org Info, Notes)** enter any required information and any additional information you have and click **Ok**.

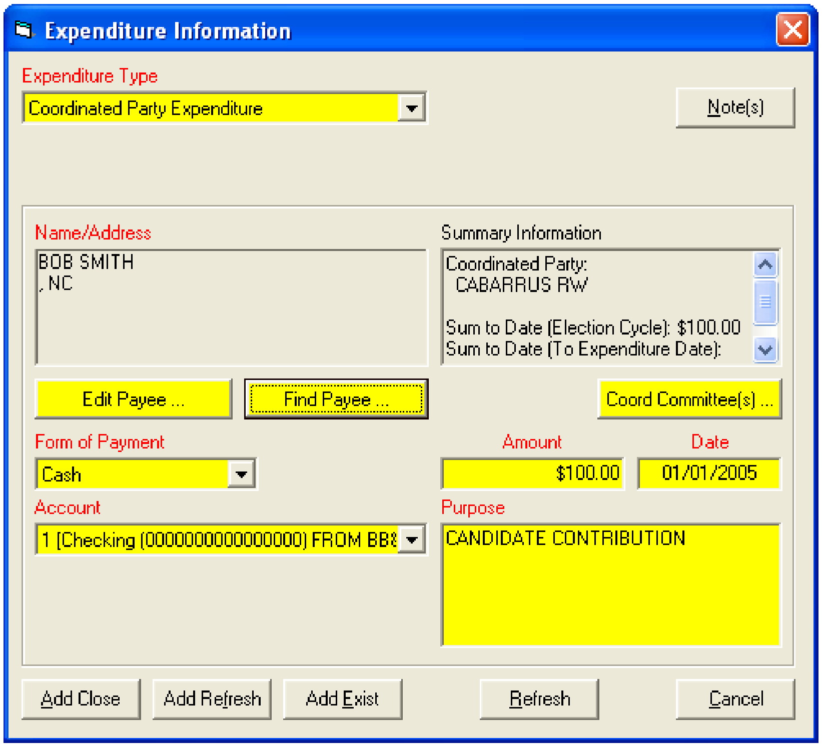


4. Select the newly created committee and click **Ok**.



Linking a Coordinated Committee to a Coordinated Party Expenditure – cont.

5. The selected committee will now appear on the expenditure form in the **Summary Information** box. Enter any other required information for the expenditure.



Click **Add Close** to add the new Expenditure and close the window if there are no more expenditures to report for the linked coordinated committee.

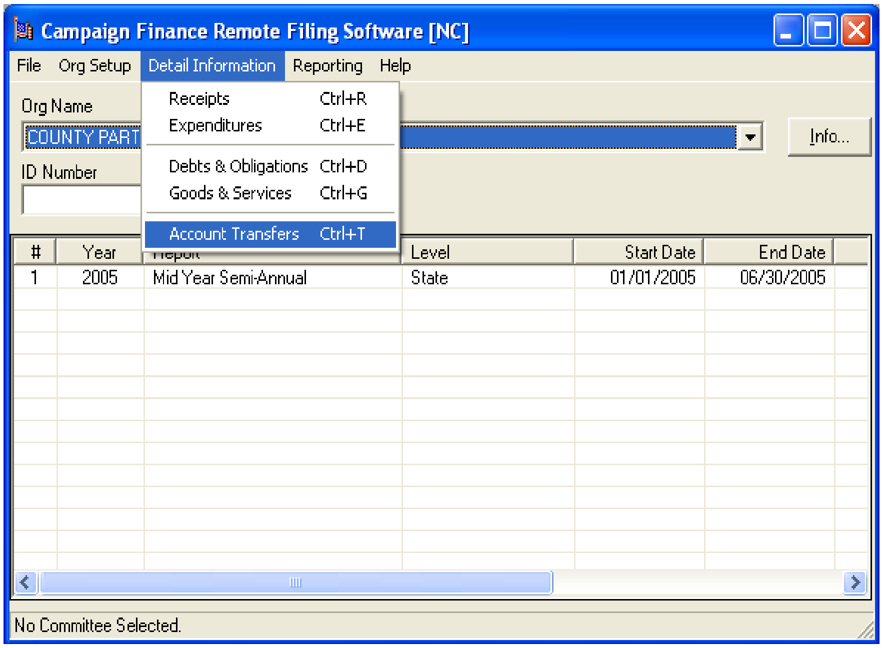
Click **Add Refresh** for entering multiple Expenditures. When you are finished entering in expenditures for the linked coordinated committee, click **Cancel**.

Click **Add Exist** for entering multiple Expenditures for the same Payee. When you are finished entering in expenditures for the linked coordinated committee, click **Cancel**.

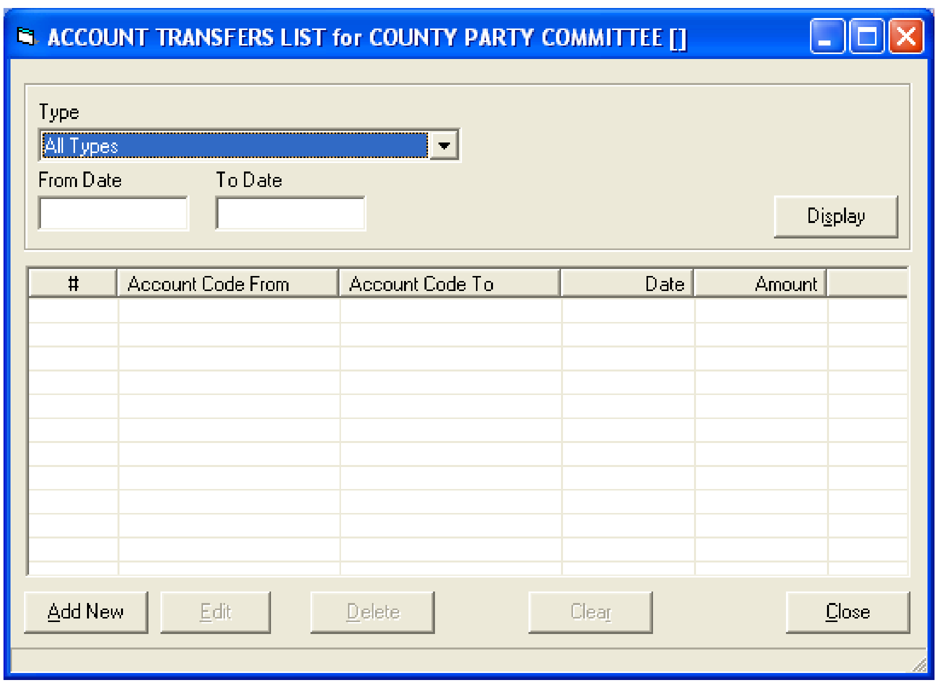
ACCOUNT TRANSFERS

Adding Account Transfers

1. Click **Detail Information → Account Transfers**

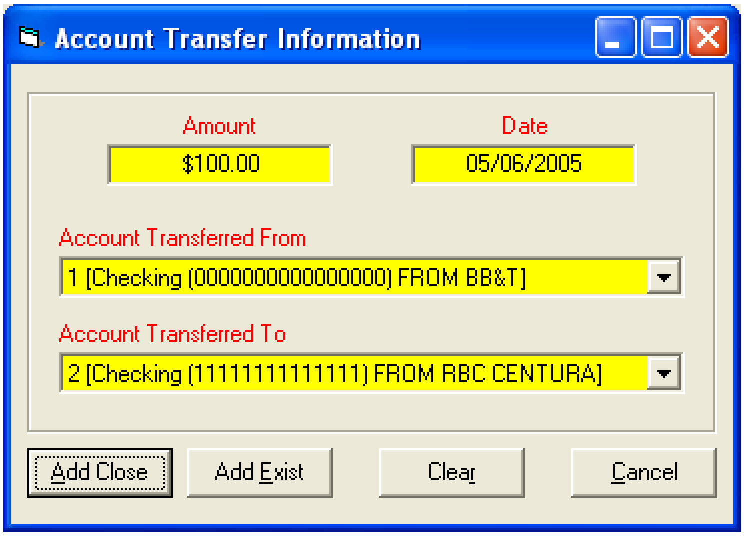


2. Click **Add New**.



Adding Account Transfers – cont.

3. Enter all required information and accounts the amount is transferring from and transferring to.



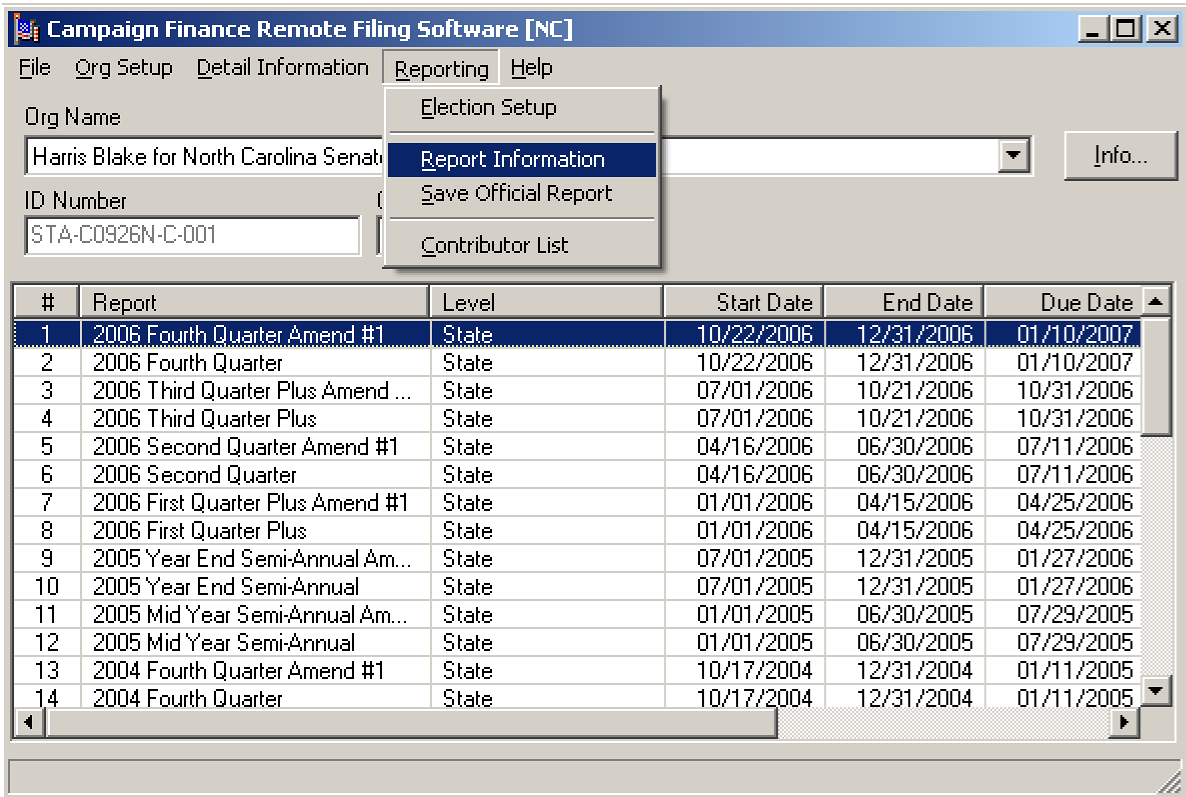
4. Click **Add Close** to add the new transfer and close the window if there are no more transfers to report.

When you are entering multiple transfers click **Add Exist**. When you have entered in all of your transfers, click **Cancel**.

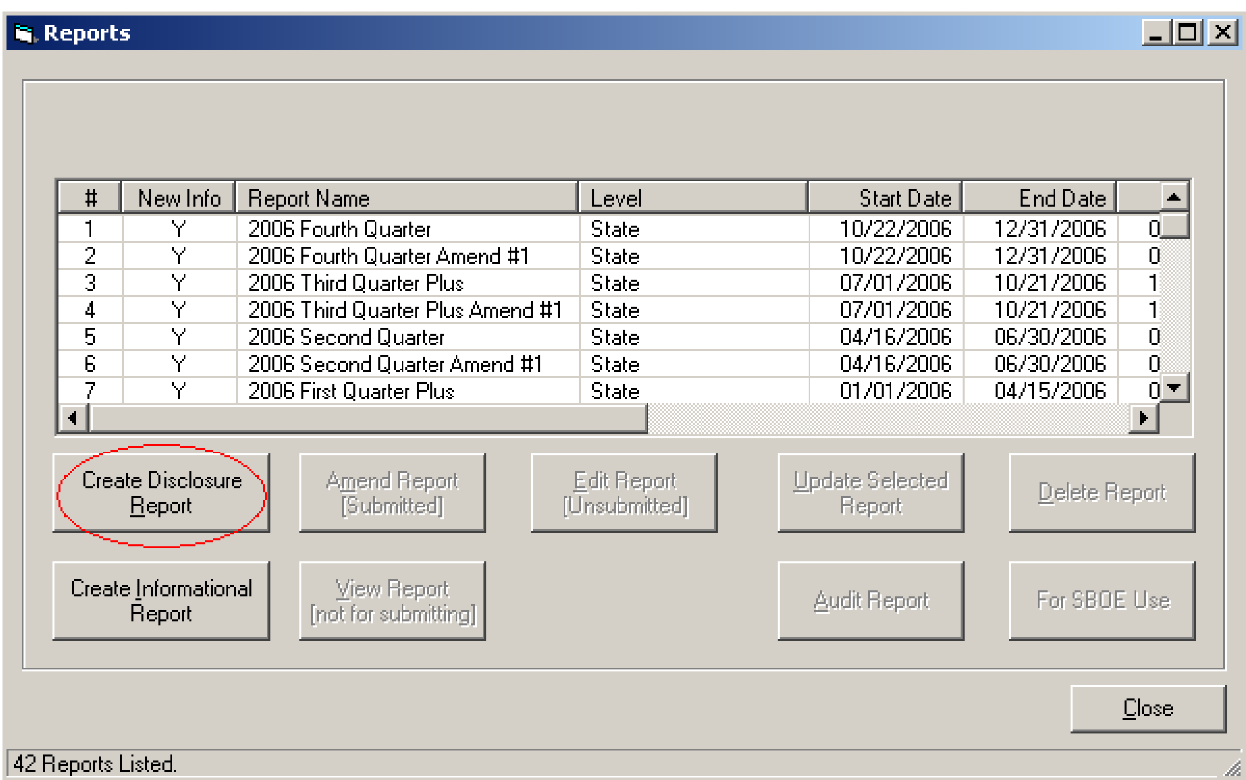
REPORTS

Creating a Disclosure report

1. Click **Reporting → Report Information**

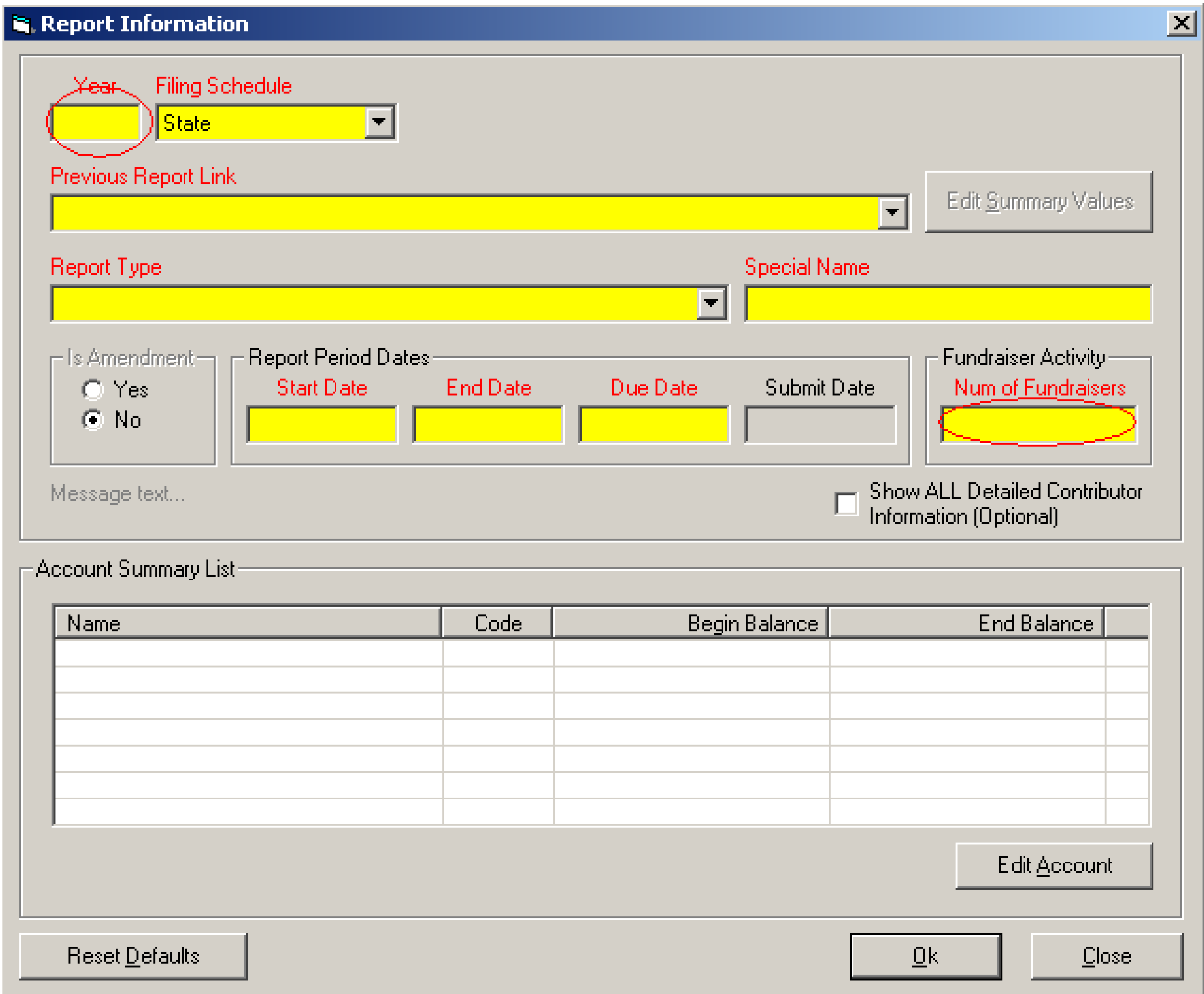


2. Click **Create Disclosure Report.**

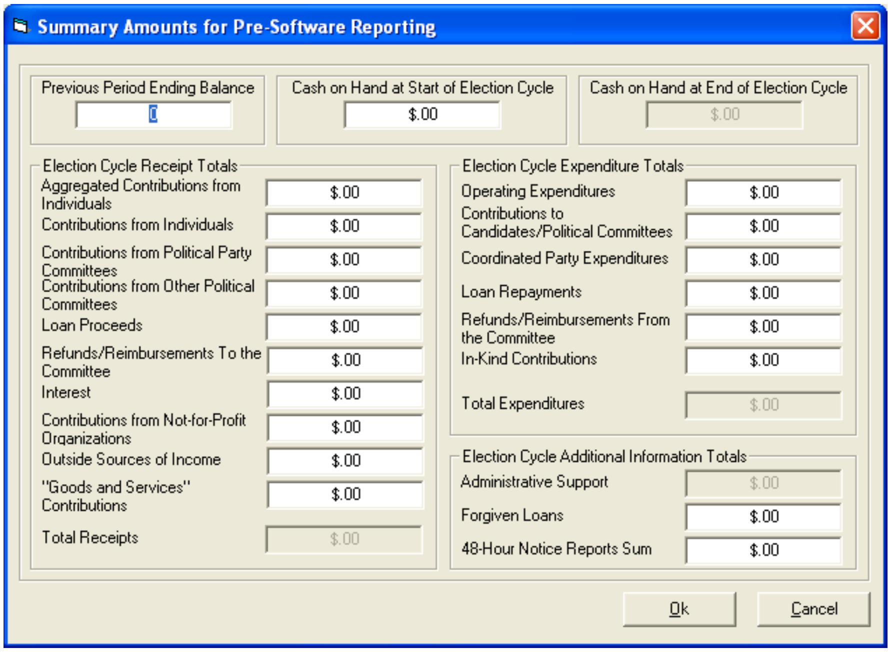


Creating a Disclosure report – cont.

3. Enter the **year of report**, **filing schedule**, **previous report link** if applicable and **report type** for the report that you are creating. The report dates will be automatically set for you. Enter the **Number of Fundraiser** (**Note**: The Number of Fundraisers is only required on the reports beginning in 2007)**.** Click **Ok** when you are finished.



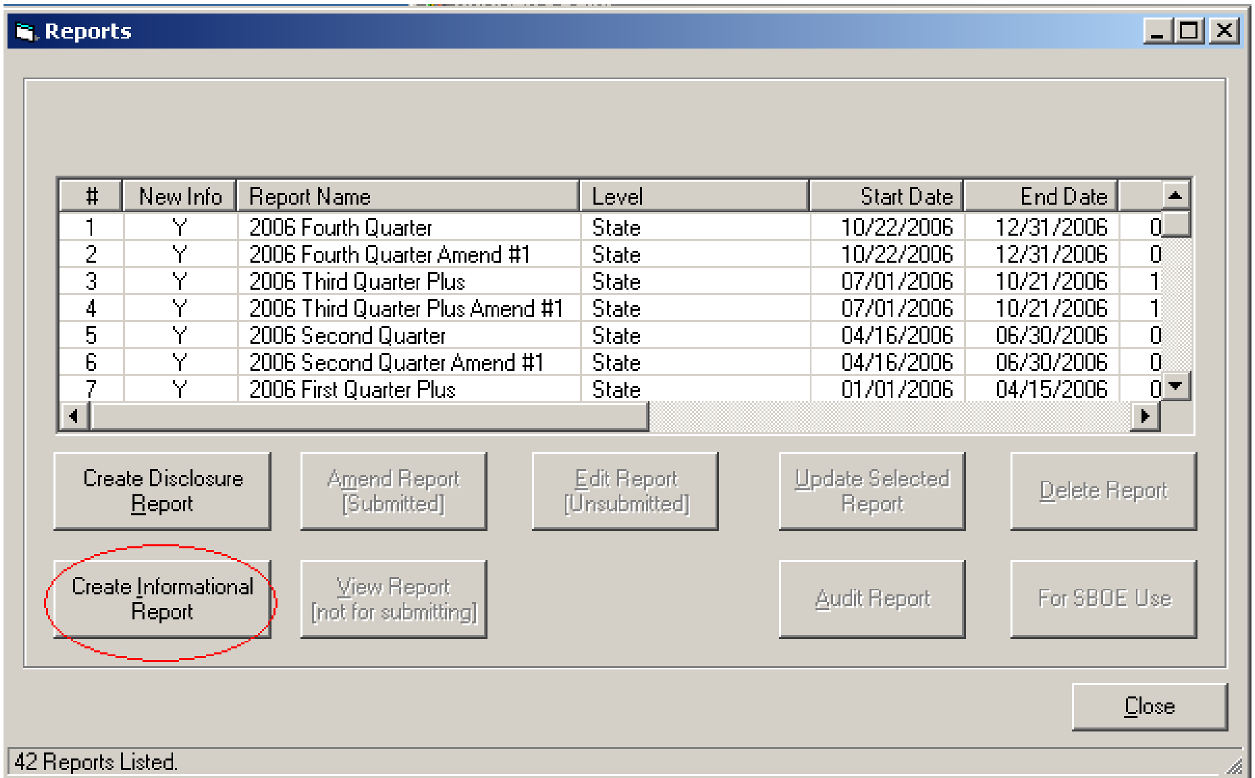
NOTE: If no previous report is available select **[No Previous Report]** from the **Previous Report Link** dropdown and click **Edit Summary Values**.



Enter ALL balance values from the LAST PAPER report that you filed and click **Ok**.

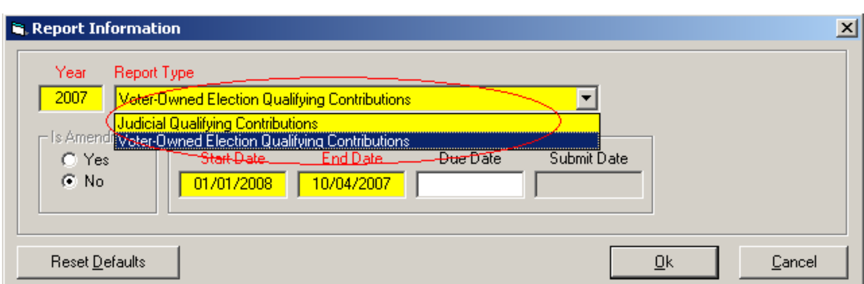
Creating the Qualified Contributions Report (CRO-2500, CRO2501 and CRO-2510)

From the main Campaign Finance Remote Filing screen, click on the menu item **Reporting**, then choose **Report Information**. You will see the following screen:

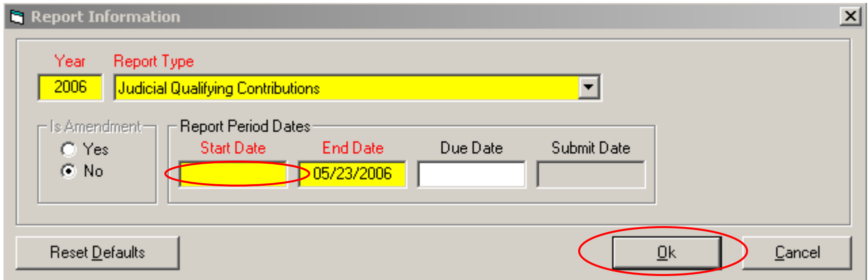


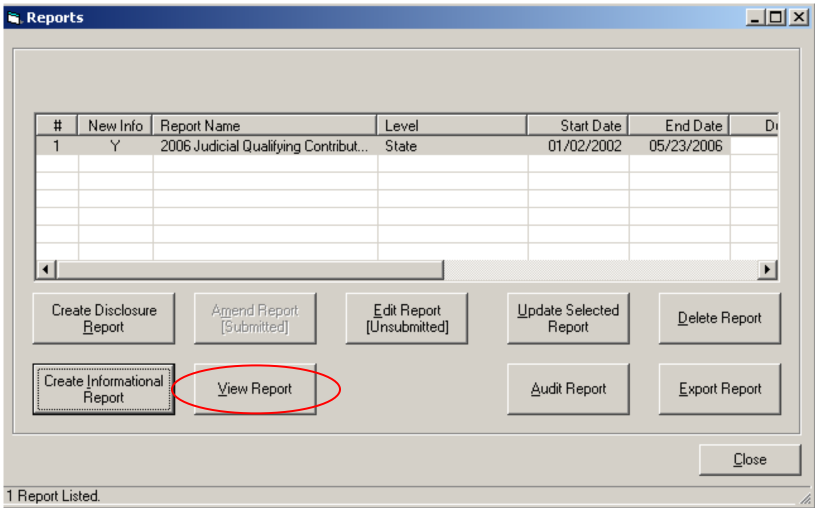
NOTE: The reports you see listed are those which have been previously created. To view a report already created, select the report and click the **View Report** button. Otherwise, to create a report, click on the button labeled, **Create Informational Report** or **Create Disclosure Report**.

1. Click **Create Informational Report** this screen will appear
2. Select a report in the **Report Type**



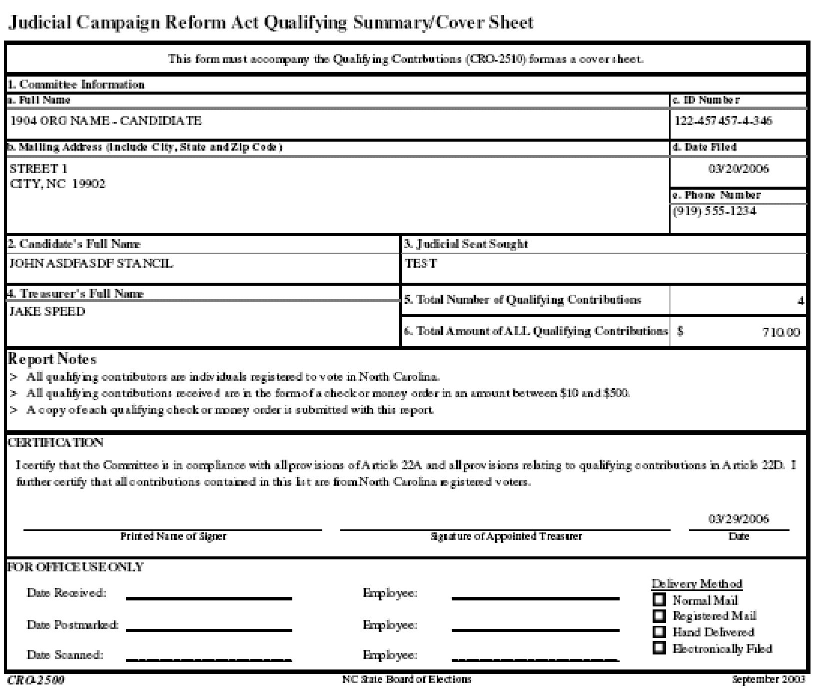
3. Type in a **Start Date** then click → **OK**.





4. Click **View Report**

5. The following report displays:



Judicial Campaign Reform Act Qualifying Summary/Cover Sheet

This form must accompany the Qualifying Contributions (CRO-2510) forms as a cover sheet.

1. Committee Information

a. Full Name: 1904 ORG NAME - CANDIDIATE

c. ID Number: 122-457457-4-346

b. Mailing Address (Include City, State and Zip Code): STREET 1, CITY, NC 19902

d. Date Filed: 03/20/2006

e. Phone Number: (919) 555-1234

2. Candidate's Full Name: JOHN ASDFASDF STANCIL

3. Judicial Seat Sought: TEST

4. Treasurer's Full Name: JAKE SPEED

5. Total Number of Qualifying Contributions: 4

6. Total Amount of ALL Qualifying Contributions: $ 710.00

Report Notes
> All qualifying contributors are individuals registered to vote in North Carolina.
> All qualifying contributions received are in the form of a check or money order in an amount between $10 and $500.
> A copy of each qualifying check or money order is submitted with this report.

CERTIFICATION

I certify that the Committee is in compliance with all provisions of Article 22A and all provisions relating to qualifying contributions in Article 22D. I further certify that all contributions contained in this list are from North Carolina registered voters.

Printed Name of Signer | Signature of Appointed Treasurer | Date: 03/29/2006

FOR OFFICE USE ONLY

Date Received: ____ Employee: ____

Date Postmarked: ____ Employee: ____

Date Scanned: ____ Employee: ____

Delivery Method
- Normal Mail
- Registered Mail
- Hand Delivered
- Electronically Filed

CRO-2500 | NC State Board of Elections | September 2003

Page 1

Creating the Qualified Contributions Report (CRO-2500, CRO2501 and CRO-2510) – cont.

Qualifying Contributions

Pg 1 of 1

#	a. Full Name (Last, First, MI) Mailing Address (include city, state, & zip)	b. Voter Reg. Number Date of Birth	c. Phone Number	d. County	e. Form of Payment	f. Date (mm/dd/yyyy)	g. Amount
1. Contributor Information							
	JOHN F. CLIFTON III STREET LINE 1 STREET LINE 2 CITY, NH 12345-1123				Check	02/21/2006	$ 100.00
	FIRST LAST NC				Check	02/15/2006	$ 100.00
	FIRST LAST STREET LINE 12 CITY, NC 11111-1			ASHE	Check	02/20/2006	$ 500.00
	BRICE WEST V STREET CITY, NC 12345-1234	12345676898 08/13/1955	(222) 222-2222 ext:222222222	PITT	Check	03/01/2006	$ 10.00
2. Total only this Page							$ 710.00

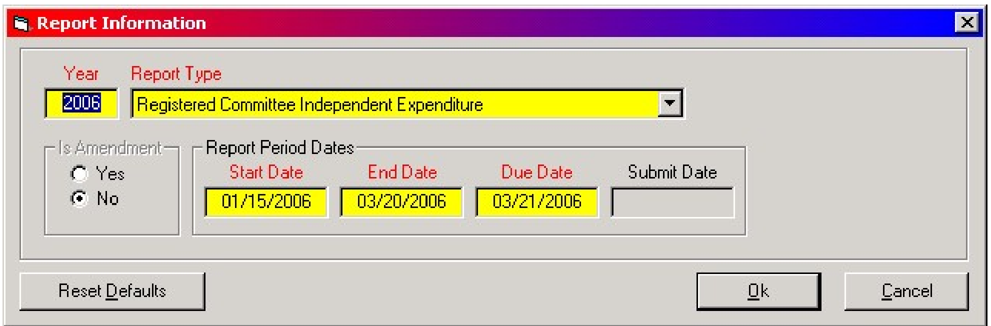
CRO-2510 NC State Board of Elections September 2003

Treasurer's Initials: ______

Page 2

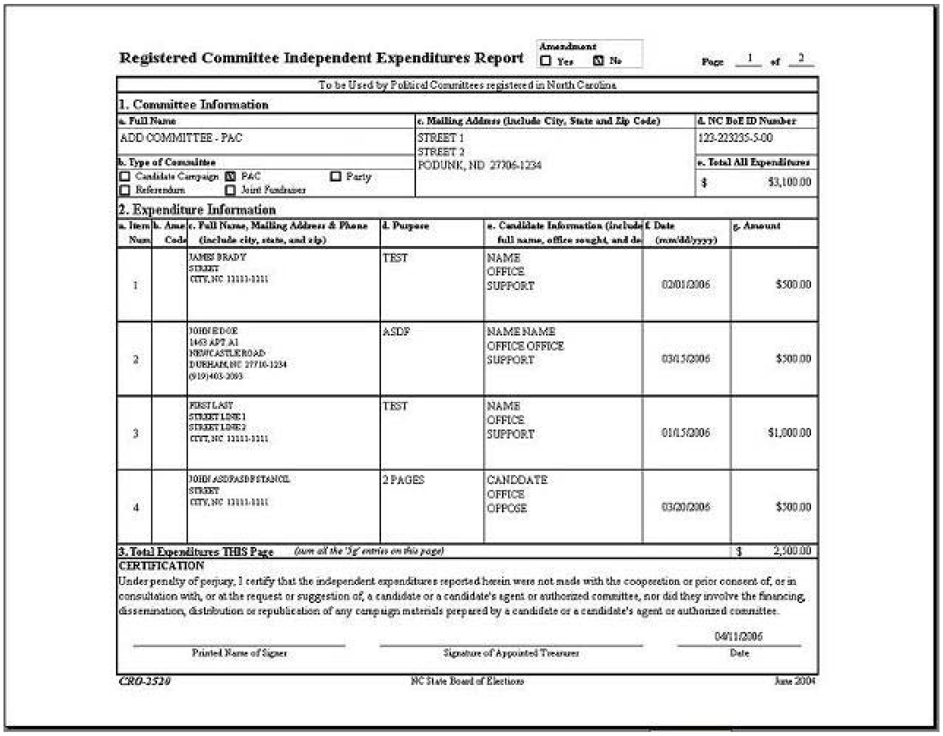
Creating the Registered Committee Independent Expenditures report (CRO-2520)

From the main Campaign Finance Remote Filing screen, click on the menu item **Reporting**, then choose **Report Information**. In the **Reports** window which appears, click on the button labeled, **Create Informational Report**. The following window will appear:



The textbox labeled **Year** is the year which the expenditures were made. It is automatically filled in with the current year. In the textbox labeled **Report Type**, choose the report name of **Registered Committee Independent Expenditure**. The **Yes/No** radio button option is informational, and is for display only. The dates during which the expenditures where made are in the boxes labeled **Start Date** and **End Date**. They will be calculated for you, using the date of the first Independent Expenditure as the **Start Date**, and the date on which the committee reaches the $3000 expenditure limit as the **End Date**. This is true for the first independent expenditure report which is created. Subsequent reports will use the date of the last Independent Expenditure report created as the **Start Date**, and the date which you reach the first $1000 expenditure total over the initial $3000 as the **End Date**. The **Due Date** is calculated to be the next business day after the report is created. Ignore the box labeled **Submit Date**. Then just click on the **OK** button. The report created for you will resemble the one seen on the next page:

Creating the Registered Committee Independent Expenditures report – cont.



Registered Committee Independent Expenditures Report

Amendment ☐ Yes ☒ No

Page 1 of 2

To be Used by Political Committees registered in North Carolina

1. Committee Information

a. Full Name	c. Mailing Address (include City, State and Zip Code)	d. NC BoE ID Number
ADD COMMITTEE - PAC	STREET 1 STREET 2 PODUNK, ND 27706-1234	123-223235-5-00
b. Type of Committee ☐ Candidate Campaign ☒ PAC ☐ Party ☐ Referendum ☐ Joint Fundraiser		e. Total All Expenditures $ $3,100.00

2. Expenditure Information

a. Item Num	b. Ame Code	c. Full Name, Mailing Address & Phone (include city, state, and zip)	d. Purpose	e. Candidate Information (include full name, office sought, and de	f. Date (mm/dd/yyyy)	g. Amount
1		JAMES BRADY STREET CITY, NC 11111-1111	TEST	NAME OFFICE SUPPORT	02/01/2006	$500.00
2		JOHN E DOE 1463 APT A1 NEWCASTLE ROAD DURHAM, NC 27710-1234 (919)403-2093	ASDF	NAME NAME OFFICE OFFICE SUPPORT	03/15/2006	$500.00
3		FIRST LAST STREET LINE 1 STREET LINE 2 CITY, NC 11111-1111	TEST	NAME OFFICE SUPPORT	01/15/2006	$1,000.00
4		JOHN ASDFASDFSTANCIL STREET CITY, NC 11111-1111	2 PAGES	CANDDATE OFFICE OPPOSE	03/20/2006	$500.00

3. Total Expenditures THIS Page *(sum all the '5g' entries on this page)* $ 2,500.00

CERTIFICATION

Under penalty of perjury, I certify that the independent expenditures reported herein were not made with the cooperation or prior consent of, or in consultation with, or at the request or suggestion of, a candidate or a candidate's agent or authorized committee, nor did they involve the financing, dissemination, distribution or republication of any campaign materials prepared by a candidate or a candidate's agent or authorized committee.

Printed Name of Signer

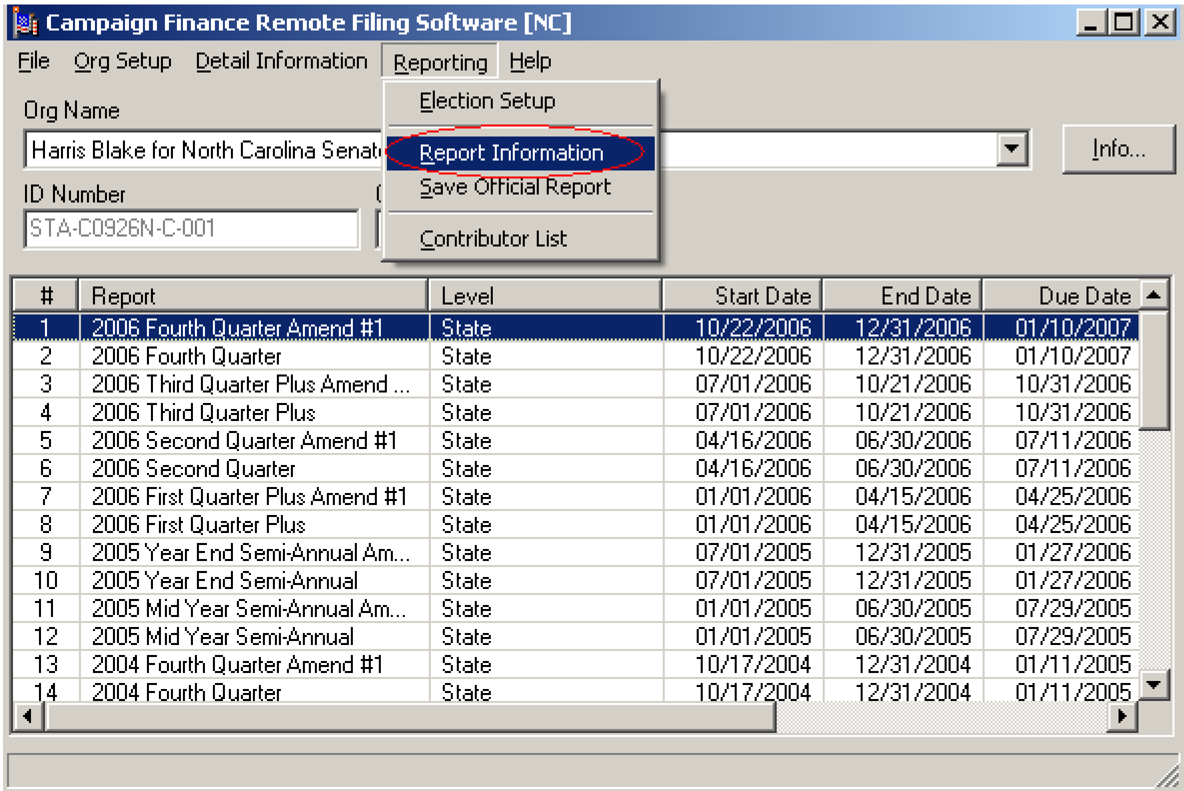
Signature of Appointed Treasurer

04/11/2006
Date

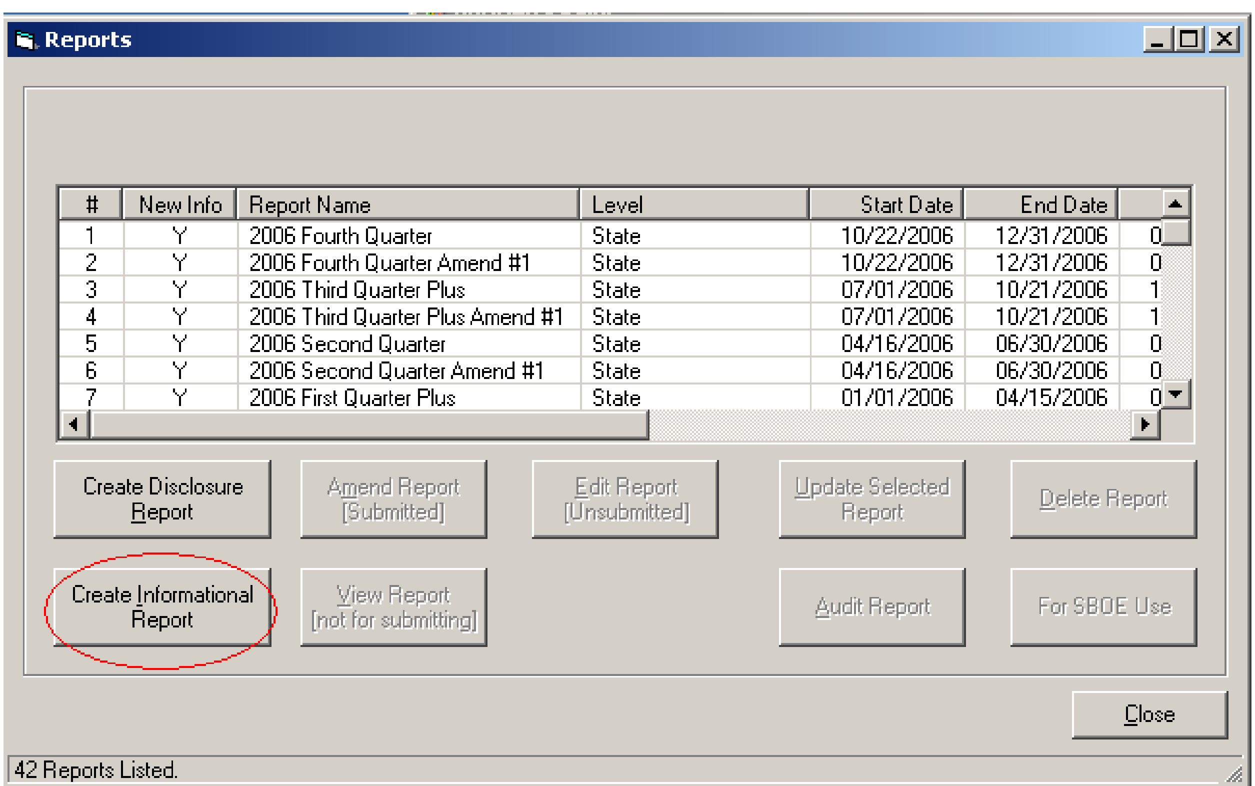
CRO-2520 NC State Board of Elections June 2004

Creating a Non-Participating Candidate Report (CRO 2530)

1. Click **Reporting > Report Information**

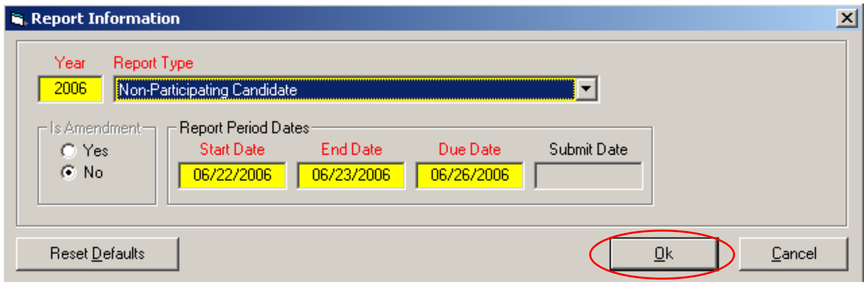


2. Click on **Create Informational report**



3. Make sure the correct report is selected and that the date range is correct

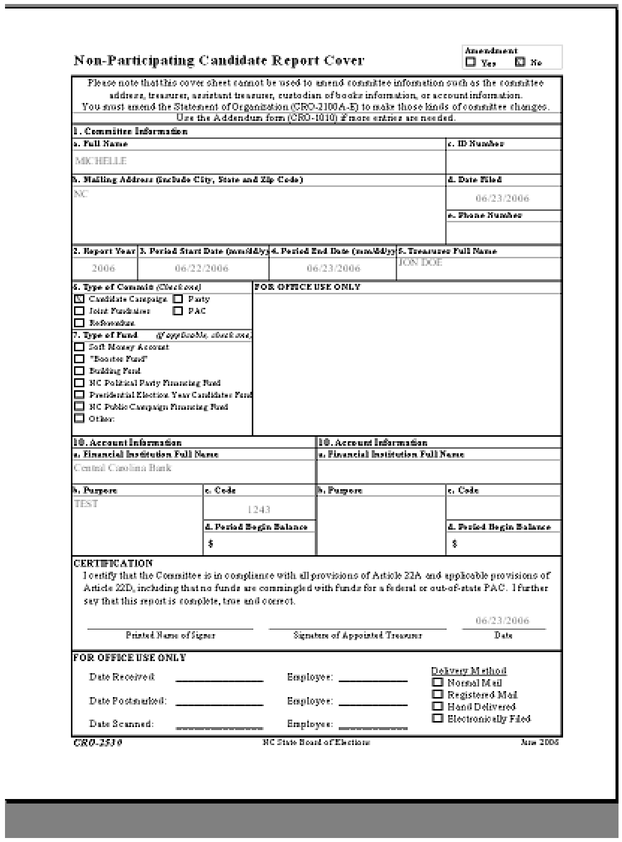
4. Click **OK**



5. Click **View Report** to verify data (see the next page for an example)

6. **Submit** the report to SBOE

Creating a Non-Participating Candidate Report (CRO 2530)



Non-Participating Candidate Report Cover

Amendment ☐ Yes ☒ No

Please note that this cover sheet cannot be used to amend committee information such as the committee address, treasurer, assistant treasurer, custodian of books information, or account information.
You must amend the Statement of Organization (CRO-2100A-E) to make those kinds of committee changes.
Use the Addendum form (CRO-1010) if more entries are needed.

1. Committee Information

a. Full Name	c. ID Number
MICHELLE	
b. Mailing Address (Include City, State and Zip Code)	**d. Date Filed**
NC	06/23/2006
	e. Phone Number

2. Report Year	3. Period Start Date (mm/dd/yy)	4. Period End Date (mm/dd/yy)	5. Treasurer Full Name
2006	06/22/2006	06/23/2006	JON DOE

6. Type of Committee *(Check one)*
☒ Candidate Campaign ☐ Party
☐ Joint Fundraiser ☐ PAC
☐ Referendum

7. Type of Fund *(if applicable, check one)*
☐ Soft Money Account
☐ "Booster Fund"
☐ Building Fund
☐ NC Political Party Financing Fund
☐ Presidential Election Year Candidates Fund
☐ NC Public Campaign Financing Fund
☐ Other:

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10. Account Information		10. Account Information	
a. Financial Institution Full Name		**a. Financial Institution Full Name**	
Central Carolina Bank			
b. Purpose	**c. Code**	**b. Purpose**	**c. Code**
TEST	1243		
	d. Period Begin Balance		**d. Period Begin Balance**
	$		$

CERTIFICATION
I certify that the Committee is in compliance with all provisions of Article 22A and applicable provisions of Article 22D, including that no funds are commingled with funds for a federal or out-of-state PAC. I further say that this report is complete, true and correct.

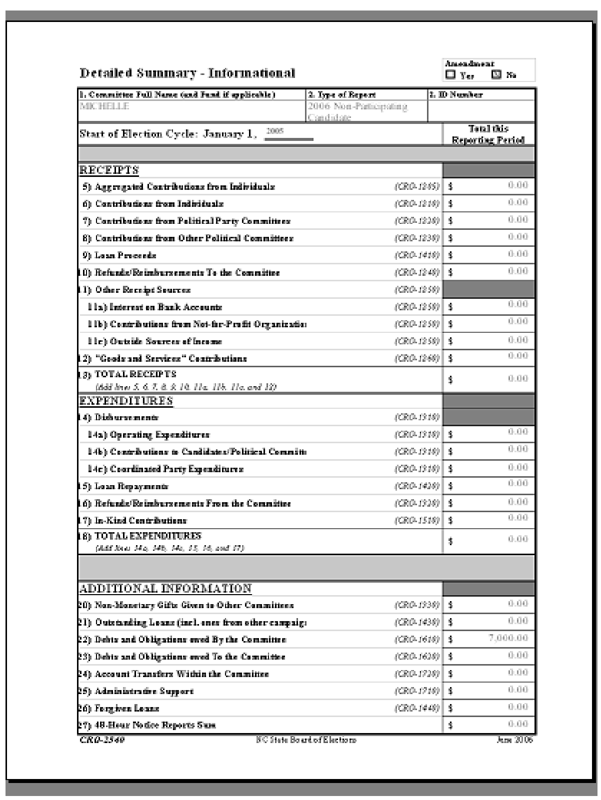
Printed Name of Signer ____ Signature of Appointed Treasurer ____ Date 06/23/2006

FOR OFFICE USE ONLY
Date Received: ____ Employee: ____
Date Postmarked: ____ Employee: ____
Date Scanned: ____ Employee: ____

Delivery Method
☐ Normal Mail
☐ Registered Mail
☐ Hand Delivered
☐ Electronically Filed

CRO-2530 NC State Board of Elections June 2006

Page 1



Detailed Summary - Informational

Amendment ☐ Yes ☒ No

1. Committee Full Name (and Fund if applicable)	2. Type of Report	3. ID Number
MICHELLE	2006 Non-Participating Candidate	

Start of Election Cycle: January 1, 2005

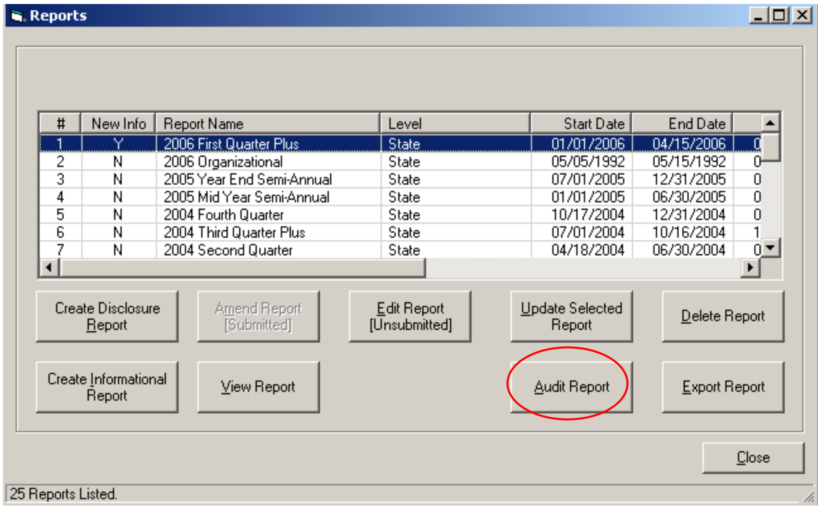
		Total this Reporting Period
RECEIPTS		
5) Aggregated Contributions from Individuals	(CRO-1205)	$ 0.00
6) Contributions from Individuals	(CRO-1210)	$ 0.00
7) Contributions from Political Party Committees	(CRO-1220)	$ 0.00
8) Contributions from Other Political Committees	(CRO-1230)	$ 0.00
9) Loan Proceeds	(CRO-1410)	$ 0.00
10) Refunds/Reimbursements To the Committee	(CRO-1240)	$ 0.00
11) Other Receipt Sources	(CRO-1250)	
11a) Interest on Bank Accounts	(CRO-1250)	$ 0.00
11b) Contributions from Not-for-Profit Organizatio	(CRO-1250)	$ 0.00
11c) Outside Sources of Income	(CRO-1250)	$ 0.00
12) "Goods and Services" Contributions	(CRO-1260)	$ 0.00
13) TOTAL RECEIPTS *(Add lines 5, 6, 7, 8, 9, 10, 11a, 11b, 11c, and 12)*		$ 0.00
EXPENDITURES		
14) Disbursements	(CRO-1310)	
14a) Operating Expenditures	(CRO-1310)	$ 0.00
14b) Contributions to Candidates/Political Committe	(CRO-1310)	$ 0.00
14c) Coordinated Party Expenditures	(CRO-1310)	$ 0.00
15) Loan Repayments	(CRO-1420)	$ 0.00
16) Refunds/Reimbursements From the Committee	(CRO-1320)	$ 0.00
17) In-Kind Contributions	(CRO-1510)	$ 0.00
18) TOTAL EXPENDITURES *(Add lines 14a, 14b, 14c, 15, 16, and 17)*		$ 0.00
ADDITIONAL INFORMATION		
20) Non-Monetary Gifts Given to Other Committees	(CRO-1330)	$ 0.00
21) Outstanding Loans (incl. ones from other campaig	(CRO-1430)	$ 0.00
22) Debts and Obligations owed By the Committee	(CRO-1610)	$ 7,000.00
23) Debts and Obligations owed To the Committee	(CRO-1620)	$ 0.00
24) Account Transfers Within the Committee	(CRO-1720)	$ 0.00
25) Administrative Support	(CRO-1710)	$ 0.00
26) Forgiven Loans	(CRO-1440)	$ 0.00
27) 48-Hour Notice Reports Sum		$ 0.00

CRO-2540 NC State Board of Elections June 2006

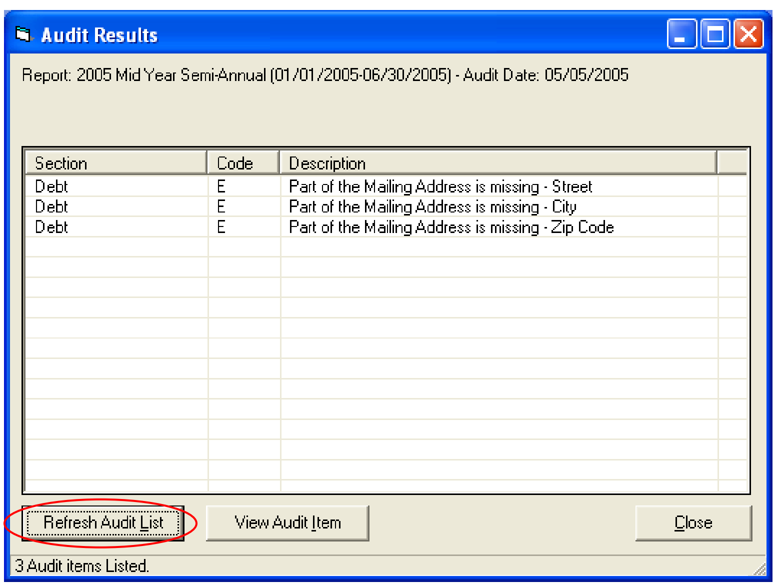
Page 2

Auditing a Report

1. Click to select the report. Then click **Audit Report**.

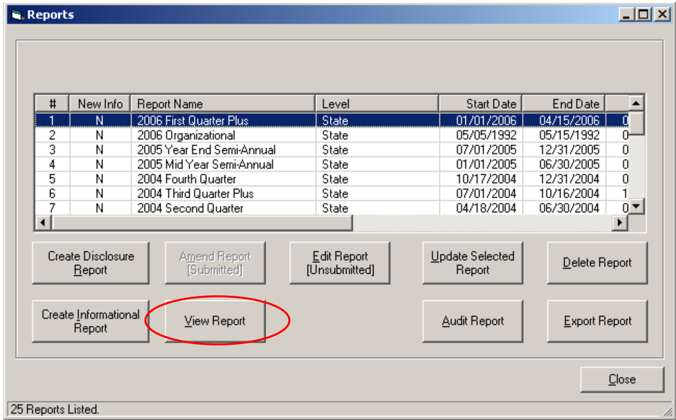


2. Once you have opened the Audit Results screen, click **Refresh Audit List** and you will see any changes that need to be made before submission. Highlight the item then click **View Audit Item** to make changes from this screen. Then click **Close** when you are finished.

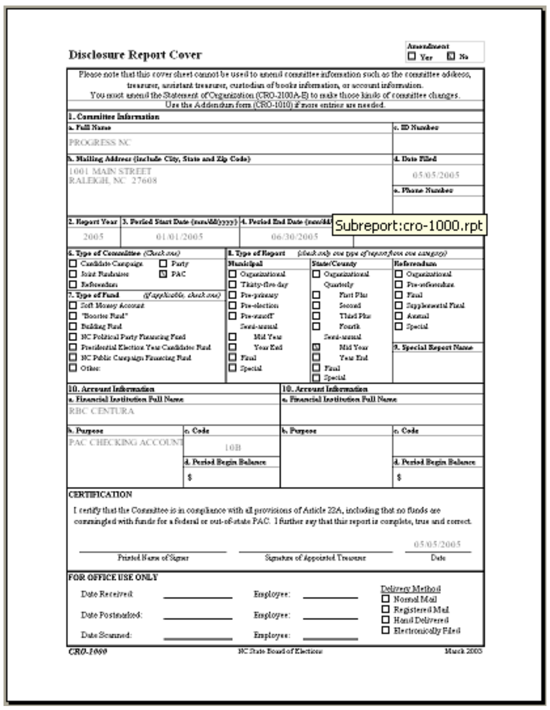


View Report

1. Click to select the report that you wish to view and then click **View Report**.



2. The report appears for you to review.



Disclosure Report Cover

Amendment ☐ Yes ☒ No

Please note that this cover sheet cannot be used to amend committee information such as the committee address, treasurer, assistant treasurer, custodian of books information, or account information.
You must amend the Statement of Organization (CRO-2100A-E) to make those kinds of committee changes.
Use the Addendum form (CRO-1010) if more entries are needed.

1. Committee Information

a. Full Name: PROGRESS NC

c. ID Number:

b. Mailing Address (include City, State and Zip Code): 1001 MAIN STREET RALEIGH, NC 27608

d. Date Filed: 05/05/2005

e. Phone Number:

2. Report Year: 2005

3. Period Start Date (mm/dd/yyyy): 01/01/2005

4. Period End Date: 06/30/2005

Subreport:cro-1000.rpt

6. Type of Committee (Check one): ☐ Candidate Campaign ☐ Party ☐ Joint Fundraiser ☒ PAC ☐ Referendum

7. Type of Fund (if applicable, check one): ☐ Soft Money Account ☐ "Booster Fund" ☐ Building Fund ☐ NC Political Party Financing Fund ☐ Presidential Election Year Candidates Fund ☐ NC Public Campaign Financing Fund ☐ Other:

8. Type of Report (check only one type of report from one category)

Municipal: ☐ Organizational ☐ Thirty-five day ☐ Pre-primary ☐ Pre-election ☐ Pre-runoff Semi-annual ☐ Mid Year ☐ Year End ☐ Final ☐ Special

State/County: ☐ Organizational Quarterly ☐ First Plus ☐ Second ☐ Third Plus ☐ Fourth Semi-annual ☒ Mid Year ☐ Year End ☐ Final ☐ Special

Referendum: ☐ Organizational ☐ Pre-referendum ☐ Final ☐ Supplemental Final ☐ Annual ☐ Special

9. Special Report Name

10. Account Information

a. Financial Institution Full Name: RBC CENTURA

b. Purpose: PAC CHECKING ACCOUNT

c. Code: 10B

d. Period Begin Balance: $

10. Account Information

a. Financial Institution Full Name

b. Purpose

c. Code

d. Period Begin Balance: $

CERTIFICATION

I certify that the Committee is in compliance with all provisions of Article 22A, including that no funds are commingled with funds for a federal or out-of-state PAC. I further say that this report is complete, true and correct.

Printed Name of Signer | Signature of Appointed Treasurer | Date 05/05/2005

FOR OFFICE USE ONLY

Date Received: ______ Employee: ______

Date Postmarked: ______ Employee: ______

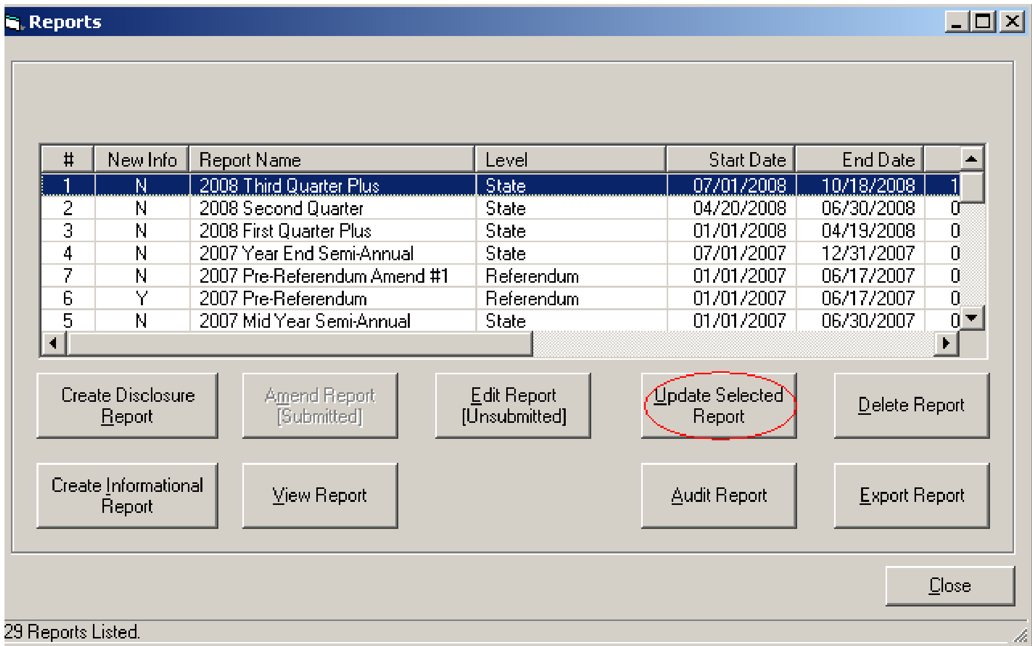
Date Scanned: ______ Employee: ______

Delivery Method: ☐ Normal Mail ☐ Registered Mail ☐ Hand Delivered ☐ Electronically Filed

CRO-1000 NC State Board of Elections March 2003

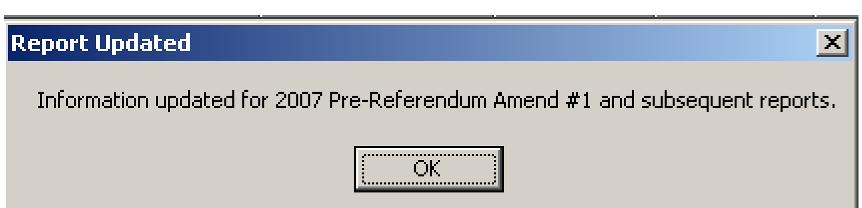
Update Report

1. Click to select the report that you wish to update and then click **Update Report**.



2. The following message will appear if you would like to update all reports that have not been submitted click Yes, if not click No. (Depending on how many reports need to be updated it may take several minutes to update)

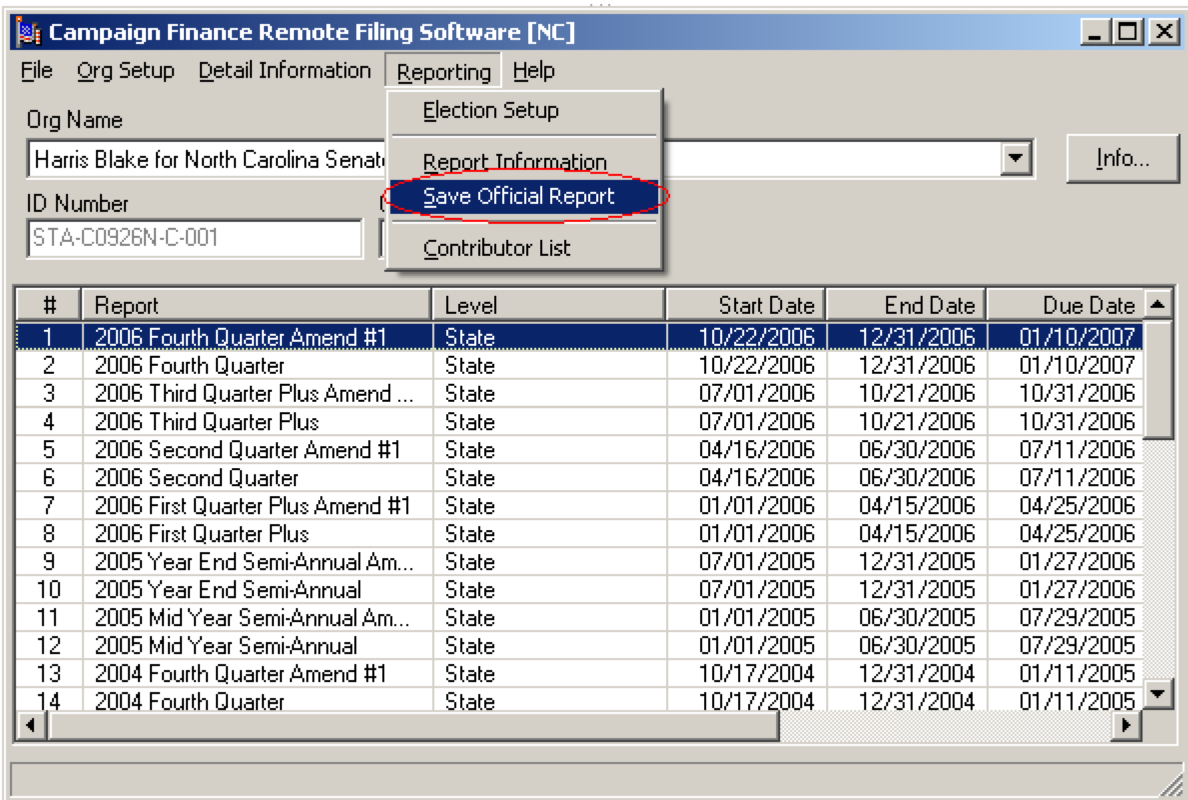
3. The Report Updated message will appear Click OK.



Save Official Report

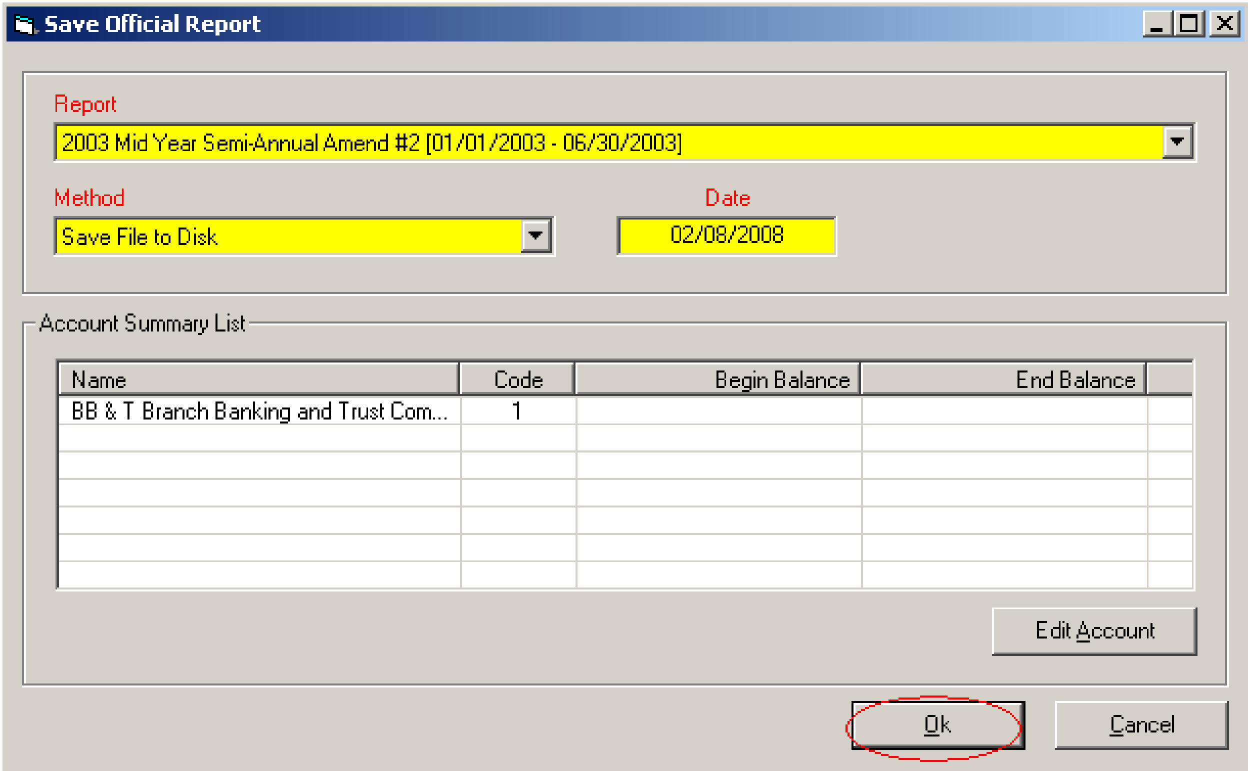
1. If you are ready to send your report to the State Board of Elections from the opening screen of your software

2. Click **Reporting → Save Official Report**

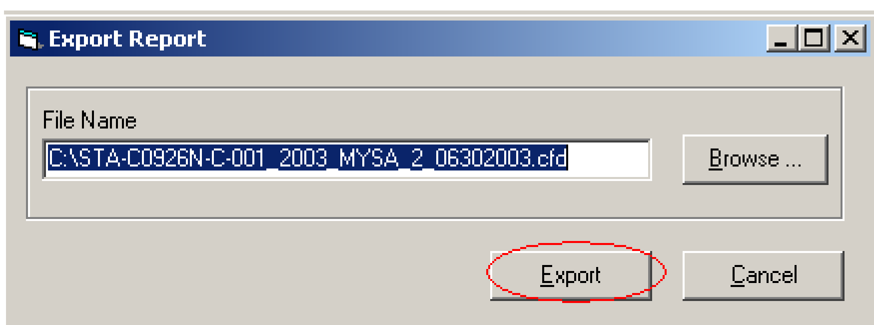


Save Official Report – cont.

3 Choose the correct report, method of submission, enter the date, and edit your account information. Then click **OK**.



1. This screen will determine where the file containing your report is saved on your computer. Enter the directory and filename or browse to find a place to save your report. Then click **Export**.



Save Official Report – cont.

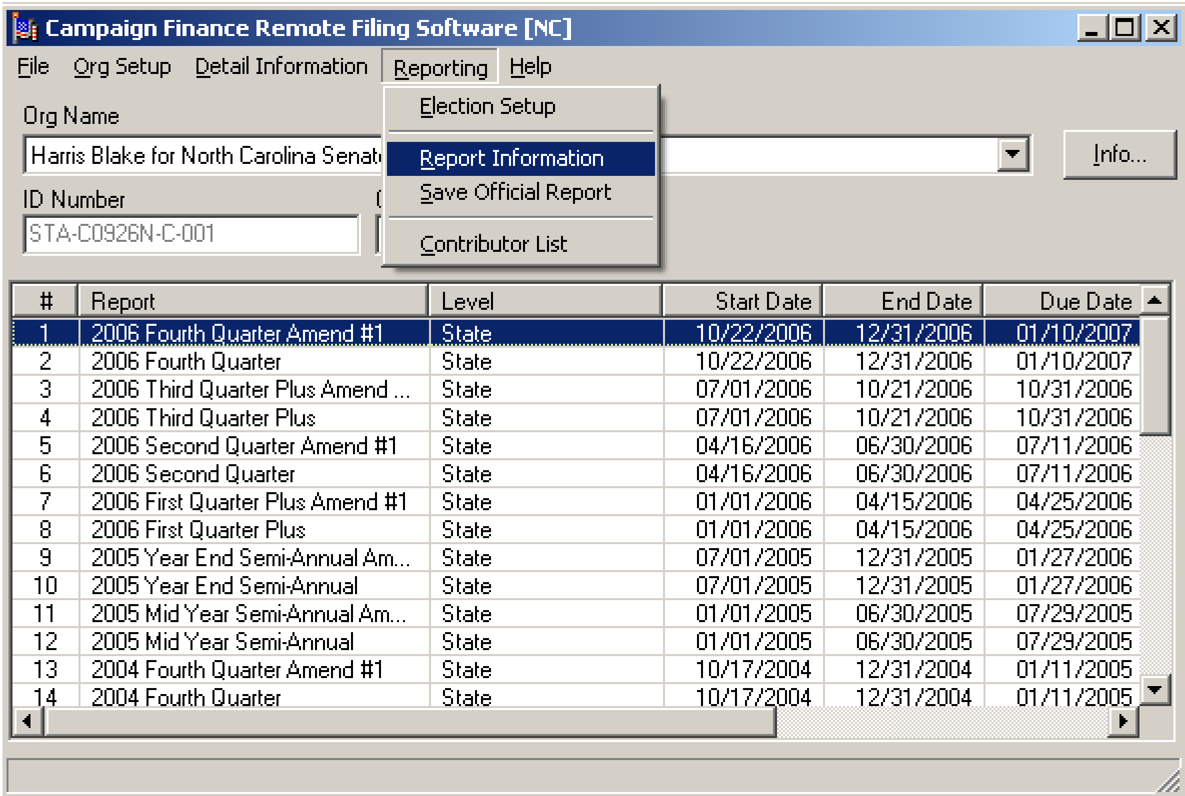
2. At this stage you will automatically be able to print the first 1 or 2 page(s) of your report. You need to do this to send in your signed cover page via mail to the State Board of Elections. Next you can open your email program and send a new email with the file that you have created attached. You should send your report to our email address.

campaign.reporting@ncsbe.gov

Now you are ready to create, audit, view and submit a new report using the Campaign Finance Reporting Software.

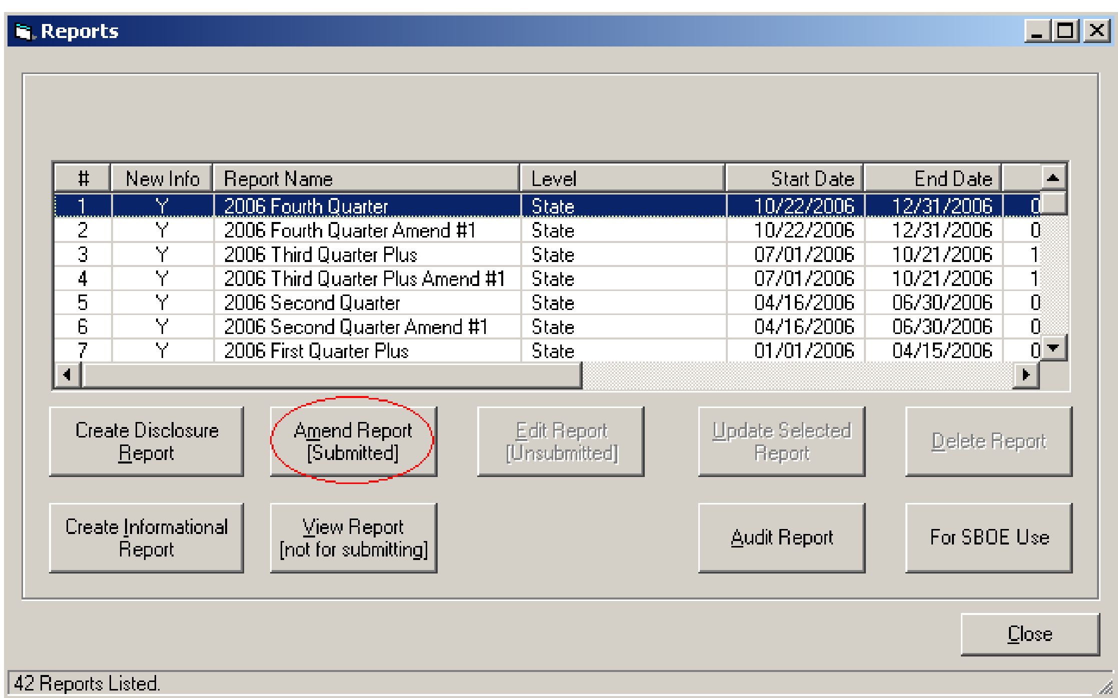
Amending a Report

1. Click Reporting → Report Information



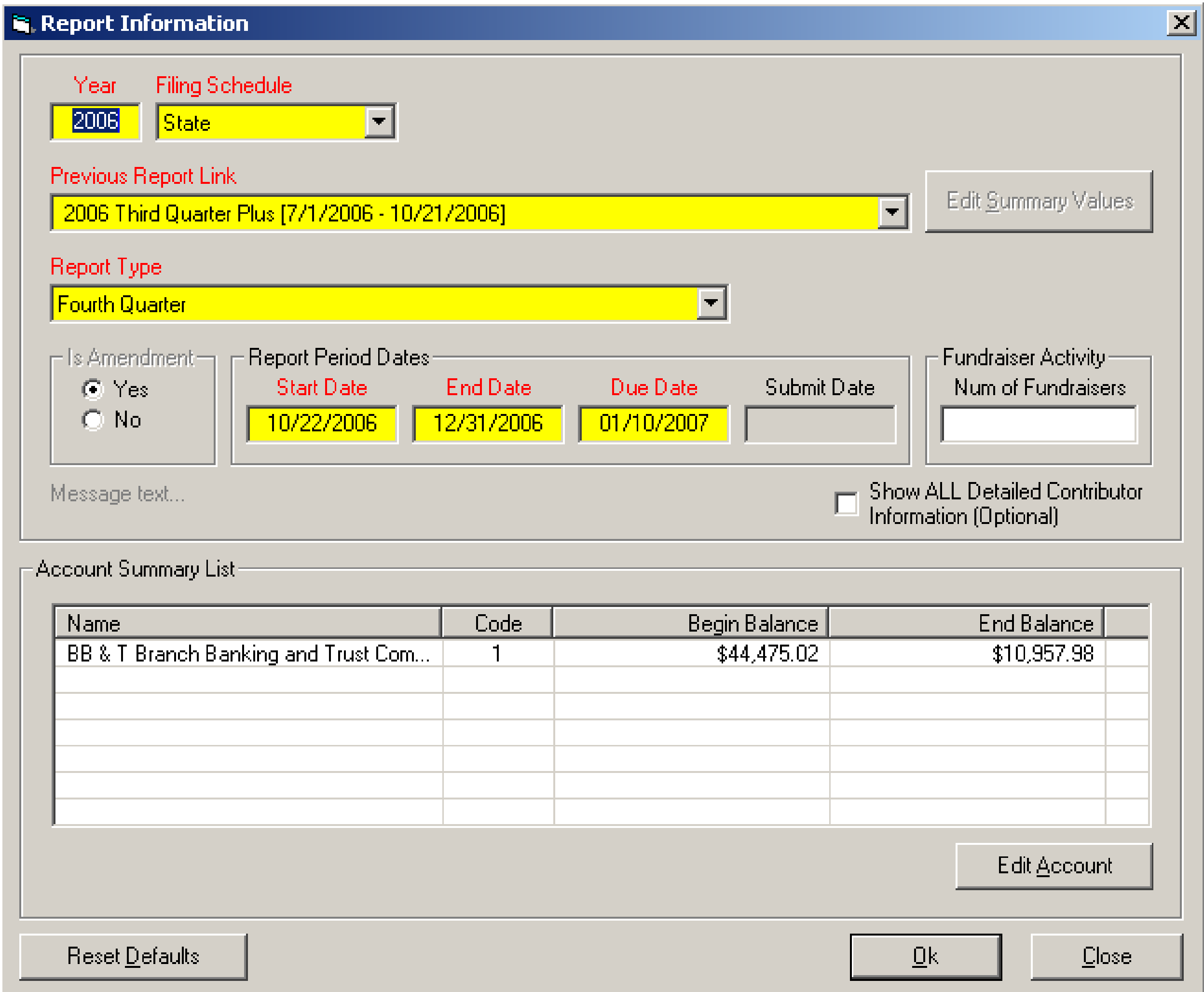
The following screen will appear:

2. Select the report that you want to Amend
3. Click **Amend Report**

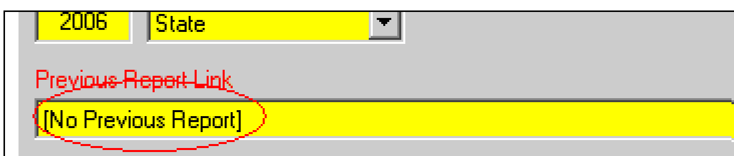
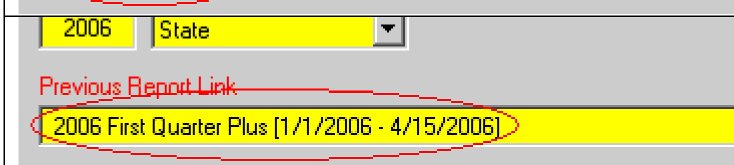
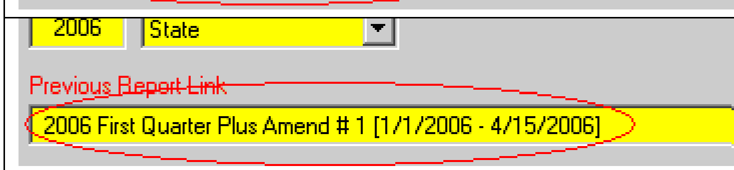


Amending a Report – cont.

The following screen will appear:



Note: The report links are:

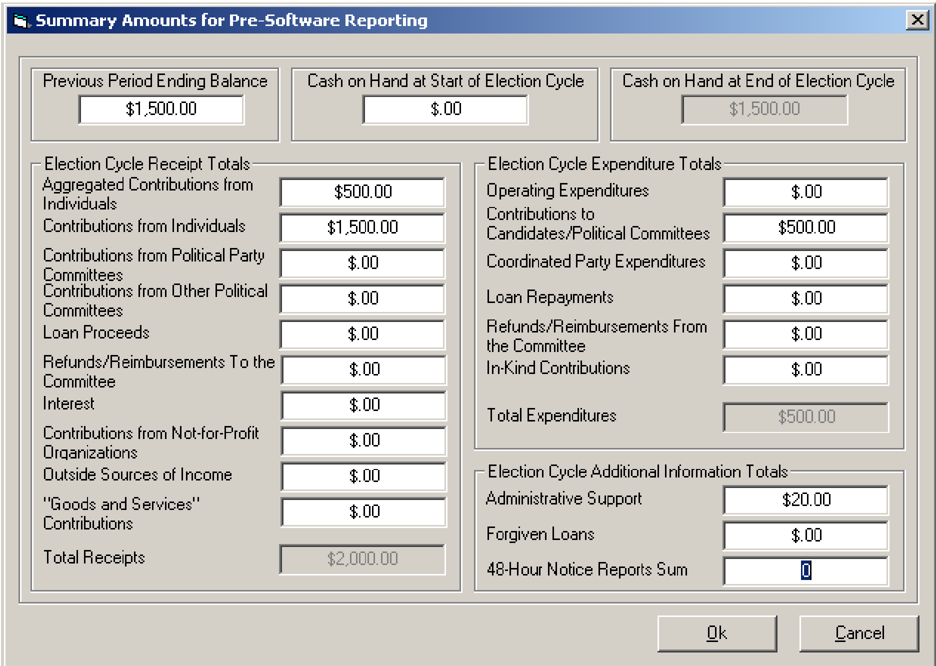
	This is used when the report you are amending has no previous report.
	This is used when the report you are amending does have a previous report that isn't amended.
	This is used when the report you are amending does have an amended previous report. (select the most current version)

Amending a Report – cont.

Note: You will only use Edit Summary Values when No Previous is selected.

4. Click **Edit Summary Values**

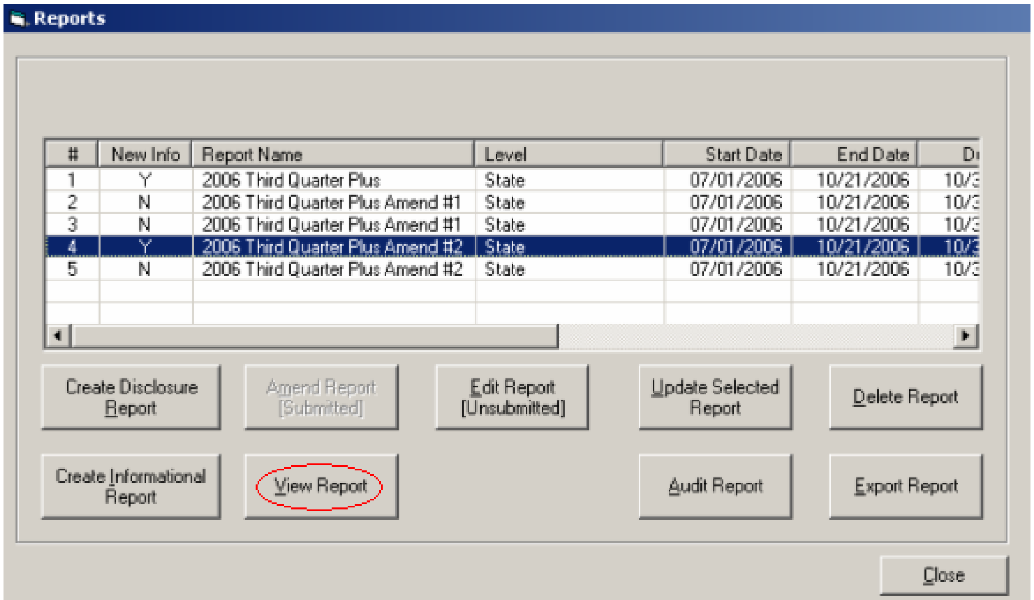
The following screen will appear:



5. **Verify** that all amounts are correct
6. Click >**OK**
7. Click >**Ok** on the next screen

Amending a Report – cont.

The following screen will appear:



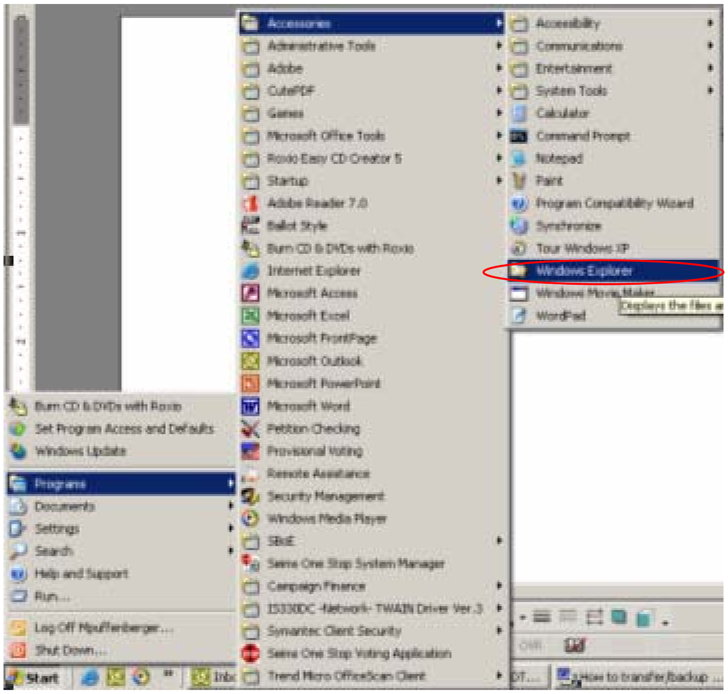
8. Click > **View Report**
9. **Verify** the information is correct

The Amendment is ready to submit. Refer back to Save Official Report on page 87 for instructions.

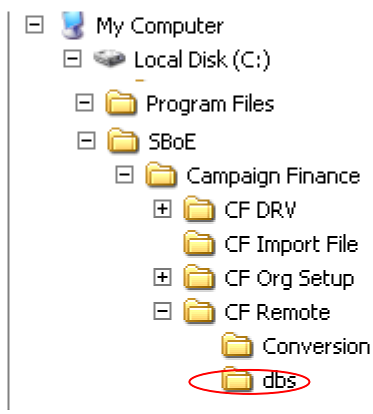
DATA PROTECTION

Backup your data version 4.x

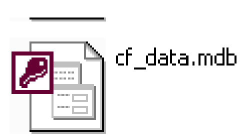
1. Click on Start → Programs → Accessories → Windows Explorer



2. Click on My Computer → Local Disk C: →Program Files →
3. SBOE → Campaign Finance → CF Remote → dbs

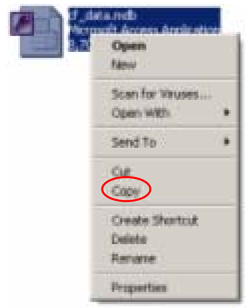


You will look for a file cf_data (it may not have the .mdb that is ok)



Backup your data version 4.x – cont.

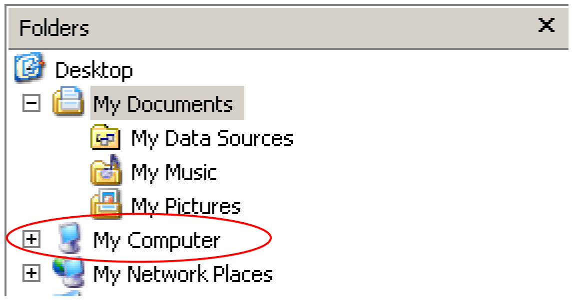
4. **Right click** on the database and select **Copy**



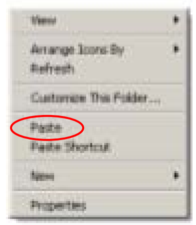
5. Copy the database to your selected mode for backing-up
6. Check to make sure the database has been backed-up on your selected media
7. Back-up is complete

Restoring Your Backup file for 4.x

1. Go to Start → Programs → Accessories → Click Windows Explorer



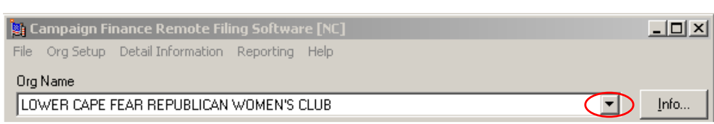
2. Go down to selected backup media → Right Click the "cf_data" file and select **Copy**
3. Then go back up to **My Computer**
4. Click Local Disk C: → Program Files →SBoE →Campaign Finance → CF Remote →**dbs**
5. On the right side right click in the open space



6. Left click the **Paste**

When you go to CF Remote on the desktop and open it you will see Committee Information

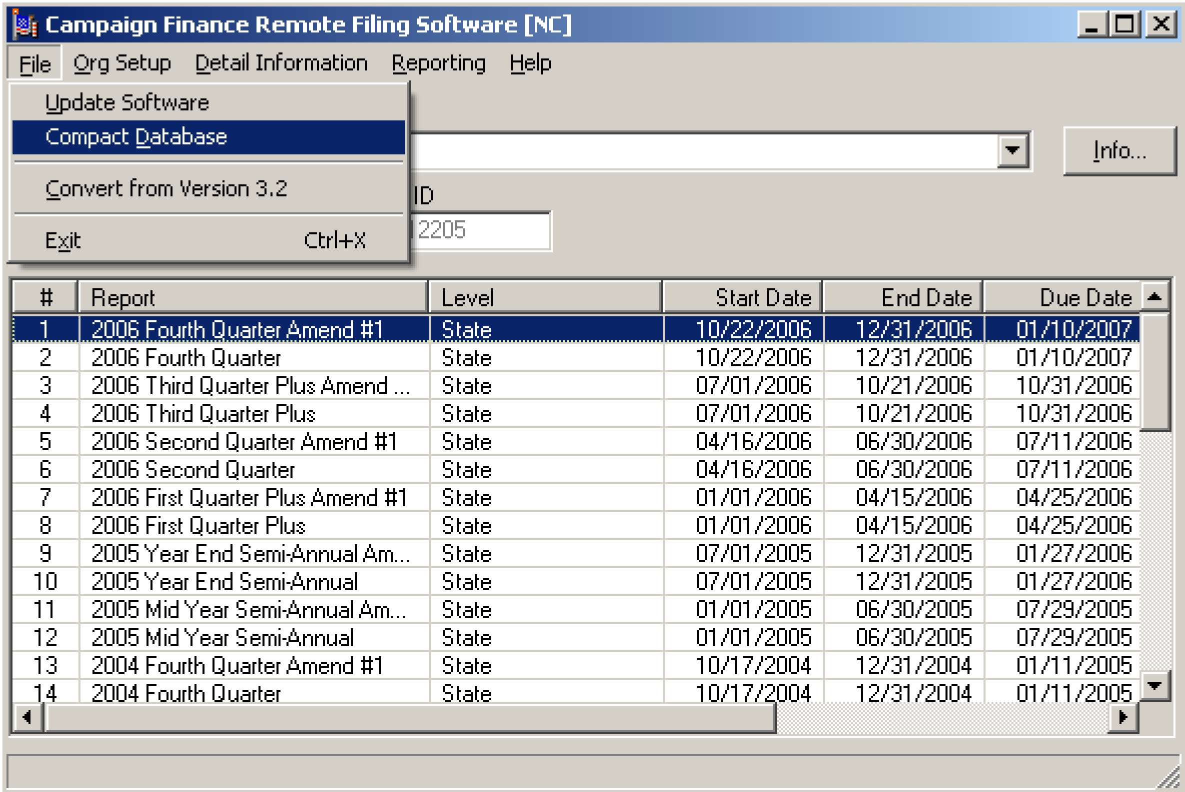
7. Click the arrow beside the Org Name drop down and Select the committee



The Committee information has been successfully moved.

Compacting the database

1. Click → **File Compact Database**



There is no further action required for the compacting process, it may however take some time depending on the size of the database.